Case Management System
Version 2.0

User's Manual

CASE MANAGEMENT SYSTEM
VERSION 2.0
DECEMBER 1995

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SITE MANAGER TECHNICAL MANUAL

CASE MANAGEMENT SYSTEM
Version 2.O

ENHANCEMENT SUMMARY

The new Case Management System (CMS) is an extremely useful patient care management tool designed to allow health care providers the resource to design and develop generic or customized Registers for a specific targeted patient population. The CMS is utilized primarily as a list keeper, but may include up to 17 Data Components for developing a Customized Register for patient care tracking purposes.

The Register Owner is responsible for entry of data. However, the CMS Package affords convenient full linkage to all Patient Care Component (PCC) data.

Based upon input from CMS Users, the new Case Management System is designed to simplify the creation and utilization of Registers and offers significant enhancements/modifications to the existing CMS Package.

For sites utilizing fairly simple Registers, there will be a complete conversion of data from the old system to the new. However, for those sites utilizing certain components of the current Case Management System, some of the data will be lost during the conversion to the new system. Our main objective is to make the system simpler to use; permit retention of as much data as possible from existing Registers currently operational in the field; and to eliminate complicated linkages between multiple data elements which were a source of error and confusion.

Listed below is a summary of the new CMS modifications and enhancements:

1. All major functions have been placed on the Main Menu to eliminate frequent jumping from the Main Menu to Sub-Menu Options. In addition, terminology of Menu Options has been improved.
2. Help prompts have been amplified greatly throughout the package. In addition, help prompts have been added to the "Register Creation" process for the purpose of describing each of the 16 CMS Data Components.
3. Registers are completely private with all data entered unique to each Register. All Supporting Lists (e.g., Complications, Interventions, etc.) are now tied to a specific Register so that the 'User' will only see the Lists associated with their specific Register when entering a '?' for choice selection.
4. The 'User' is now able to indicate whether patients in a specific Register should be identified on Health Summary displays as being a member of that Register.
5. "LAYGO" during data entry has been eliminated.

6. "Categories" have been eliminated; only "Lists" have been retained. The Diagnostic Modifiers Component has also been eliminated. There is no longer a linkage between Interventions and the Diagnosis Components.

7. The Automatic Template Transfer of multiple patients into a specific Register now allows the 'User' to choose the Status for these patients; e.g., Active, Inactive, Unreviewed, Transient.

8. The "Appointments" Component has been changed to "Recall Dates" and simplified greatly. Linkage to Services and Resources has been completely eliminated. Each Recall includes Date, Referral Organization and Provider, Purpose, Recall Status, and Contact Person for Recall. The concept is that this is not an appointment, in the literal sense, but, rather, Recall Dates (often many months in the future) at which time the patient is to be contacted to schedule an appointment. The System will also print a "Recall Letter," with a standard text (plus an additional customized text area) and the name and telephone number of the contact person. The 'User' is now able to view the letter structure and content prior to final printing.
9. The "Resource Directory" Component has been moved out of the Register management options and is now a stand-alone Menu Option for the purpose of building and printing Resource Directory Listings.

10. Major additions and enhancements have been incorporated into the Report Generation Menu Options:

    • Report extraction capabilities have been significantly improved throughout the Patient and Statistical Reports Menu Option.

- A Report Generator, similar to the "Patient Lister" (PGEN) in PCC Management Reports has been added. This will permit selection, printing, and sorting of all CMS Data Element Components plus many demographic and clinical data types.

- Creation of Templates may now be run in the background mode. A description of a Template may be generated on a printer or terminal screen, producing a brief listing containing the Register Name, Template Name, Creator of the Template, and Number of entries in Template.

11. For convenience of PCC data retrieval, the Q-Man Menu Option is also available within the CMS Menu Structure.

12. Improved Register Security/Confidentiality has been addressed in the New CMS Package. Only the "Creator" of the Register may modify the existing Register Structure, or assign an Authorized User to that Register, or Delete that Entire Register.

GENERAL OPERATING TIPS/SUGGESTIONS

The following is the suggested sequence of operations in creating and utilizing the new CMS Package:

Operating Sequence:

1. Create a Register
2. Customize the Register
3. Add Authorized Users
4. Build Reference Tables (Supporting Lists)
5. Add Patients:
   Manually, one at a time; or Transfer lists of patients automatically from a Template
6. Enter specific Patient data
7. Produce Case Summaries
8. Generate a variety of reports

Helpful Hints or Caveats:

1. Start Simple
2. Minimize Tracking Items (Register Data Components)
3. Minimize Data Entry
4. Do Not Track Visit-based Data

Resource Manual Examples:

1. Screen Displays are provided as (step-by-step Guides) for each Data Type Component and each Menu Option.
2. The _____ Underscore Line and BOLD TEXT indicate 'User' Data Entry.

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MENU STRUCTURE

```
**********************************
**  CASE MANAGEMENT SYSTEM  **
**           VERSION 2.0          **
**********************************


           MAIN MENU


CR      Create/Modify Register Structure
AU      Add Authorized Users
BL      Build Supporting Lists
DL      Display Supporting Lists ...
AD      Add/Delete Patients ...
DE      Data Entry
RG      Report Generation ...
RD      Resource Directory ...
QM      Q-Man (PCC Query Utility)
DEL     Delete Entire Register
LTR     Manage Recall Letters ...
        Install IHS Diabetes Register
```

SUB MENUS

DL Display Supporting Lists		AD Add/Delete Patients	
CL	Complications List	AP	Add Patient(s)
LD	Diagnoses List	DP	Delete Patients from Register
CR	Diagnostic Criteria	TX	Data Transfer From A Search Template
SL	Services List	**LTR Manage Recall Letters**	
EL	Etiology List	LTP	Print Specified Recall Letter(s)
AL	Intervention Plan List	LTS	Setup/Modify Letter Format Structure
ML	Medications List		
RFL	Risk Factors List		
RG Report Generation		**RD Resource Directory**	
CS	Case Summary, Individual	RE	Add or Edit a Resource Directory
MS	Case Summary, Multiple	RI	Inquire To A Specific Resource
ML	Master List	RL	Resource Directory (Detailed Listing
PR	Patient and Statistical Reports	RS	Print Resource (By Services Available)
GEN	Register Patient General Retrieval (Lister)		
LVST	Display Data for a Patient's Last Visit		

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```
         **********************************
         **  CASE MANAGEMENT SYSTEM  **
           **         VERSION 2.0         **
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                      MAIN MENU


         CR      Create/Modify Register Structure
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         LTR     Manage Recall Letters ...
                 Install IHS Diabetes Register
```

CR   Create/Modify Register Structure

NOTE: There are 16 different Data Component Types in the CMS. The system has been developed so
             you can customize your register to use only those data type components which are relevant to the
             content and scope of your register. It is important to note that you can return at any time to add
             or delete data types. When you remove a data type from a Register, none of the patient specific
             data you have entered or the Register Supporting Data is deleted. This process only deactivates
             that data type so you will no longer see it when you are managing a particular Register.

             After answering a few basic Register Setup questions, the 16 Data Type Components will be
             displayed. You must first indicate whether you are 'A' Adding or 'D' Deleting Data Type
             Components by entering an 'A' or 'D'. You can choose ALL the components by selecting
             Number 17; or by separating each number by commas. After you have indicated your selection,
             strike <CR>. Your new configuration will be displayed (<== indicates component selection). If
             you need to make changes, repeat the Add of Delete process.

             In addition, Help Text for each Data Type Component is available by entering an 'H' at the
             Select Data Type prompt and selecting the desired Component number.

```
                    **********************************
                    **   CASE MANAGEMENT SYSTEM    **
                    **********************************
                         REGISTER SELECTION UTILITY


REGISTER: **EMPLOYEE HEALTH**

ARE YOU ADDING 'EMPLOYEE HEALTH' AS
A NEW CMS REGISTER TYPE (THE 19TH)? **Y**  (YES)

REGISTER NAME: EMPLOYEE HEALTH REGISTER  Replace
DATE ESTABLISHED: **T**  (MAY 12, 1995)
REGISTER CREATOR: JARLAND,TONI M//  Defaults to User-Change if Desired
HEALTH SUMMARY DISPLAY: **?**


A "YES" entry will display a message on the PCC Health Summary that the patient is a member of this Register.  Consider
the CONFIDENTIAL nature of this Register before answering "YES".


 CHOOSE FROM:
        1       YES
        0       NO
HEALTH SUMMARY DISPLAY: **YES**
BRIEF DESCRIPTION: **?**


You may enter a Brief Description regarding the content & purpose of this Register.  Answer must be 3-65 characters in
length.
```

```
              ***************************************************
              **   CUSTOMIZE EMPLOYEE HEALTH REGISTER    **
              ***************************************************


        1)    CARE PLANS                9)    FAMILY MEMBERS
        2)    CASE HISTORY             10)    INTERVENTIONS
        3)    CASE REVIEW DATES  <**   11)    MEASUREMENTS
        4)    COMMENTS                 12)    MEDICATIONS
        5)    COMPLICATIONS            13)    RECALLS
        6)    DIAGNOSES                14)    REGISTER DATA   <**
        7)    DIAGNOSTIC CRITERIA      15)    RISK FACTORS
        8)    ETIOLOGY                 16)    SERVICES
                                       17)    ALL DATA TYPES


        <** Indicates automatic selection of Register Component

'A' to ADD, 'D' to DELETE option(s) or 'H' for HELP  ==> **ADD**


'<==' indicates option already selected for this register.  To select several data types separate them with commas.
For example:  ==> 1,3,7,9

Select option(s) ==> **1,2,4,5,6**


NOTE:  The Screen Display after Choosing Register Data Type Component above.
```

```
**************************************************
**   CUSTOMIZE EMPLOYEE HEALTH REGISTER   **
**************************************************
```

1)	CARE PLANS	<==	9)	FAMILY MEMBERS	
2)	CASE HISTORY	<==	10)	INTERVENTIONS	
3)	CASE REVIEW DATES	<**	11)	MEASUREMENTS	
4)	COMMENTS	<==	12)	MEDICATIONS	
5)	COMPLICATIONS	<==	13)	RECALLS	
6)	DIAGNOSES	<==	14)	REGISTER DATA	<**
7)	DIAGNOSTIC CRITERIA		15)	RISK FACTORS	
8)	ETIOLOGY		16)	SERVICES	
			17)	ALL DATA TYPES	

'A' to ADD, 'D' to DELETE option(s) or 'H' for HELP ==>

'<==' indicates option already selected for this register.
To select several data types separate them with commas.
For example: ==> 1,3,7,9

Select option(s) ==>   You may continue to add or delete Register Data Type Components.

On line HELP is available for each of the above Data Type Components by entering **H** for Help.

Listed below are brief descriptions of each Component.

DATA TYPE COMPONENT DESCRIPTION SUMMARY

** CARE PLAN COMPONENT **

The CARE PLAN COMPONENT consists of six specific plans. They are Medical, Nursing, Social Services, Educational, Mental Health, and Other. You may record care plans for any or all of these care plan categories. Plans are entered as free text fields of unlimited length.

** CASE HISTORY COMPONENT **

The CASE HISTORY COMPONENT is used to describe the events and factors which lead to the patient's enrollment in the register. This component consists of three fields: Date of Onset, Place of Onset, and Description. The Description field is a text, or word-processing, field of unlimited length. It permits recording information that might not appear in the list of problems or diagnoses found on the PCC Health Summary.

** CASE REVIEW DATES COMPONENT **

The CASE REVIEW DATES COMPONENT permits entry of the date you review a patient's case and the date you plan to review it again in the future. This component facilitates retrieval of all patients that have not been reviewed in a specified time frame, such as the past year, or those scheduled to be reviewed in a specified time frame, such as next month. The CASE REVIEW DATES COMPONENT is automatically included with every register.

** COMMENTS COMPONENT **

The COMMENTS COMPONENT is a free text field for entering miscellaneous information that does not easily fit into any of the other component types. Length of the field is unlimited. Despite the free text nature of the field, you can selectively retrieve information from COMMENTS using the Case Management Patient Lister Report. If you know of specific information, or terms, that you wish to retrieve, it is essential that you use the same terminology whenever you enter that term because retrieval will be accomplished by use of a text search. For example, you can find all patients with the term "AMPUTATION" or the term "STAGE IV" if you enter it consistently; i.e., case sensitive The term to be retrieved can be entered anywhere in the COMMENTS text; it does not have to be at the beginning of a line or on a specific line.

** COMPLICATIONS COMPONENT **

The COMPLICATIONS COMPONENT is utilized for identifying complications associated with the diagnosis or health problems for which a patient was entered into this register. For a diabetes register, for example, complications might include amputations, diabetic retinopathy, diabetic nephropathy, etc. In order to utilize the COMPLICATIONS COMPONENT, you must first build a list of complications that are appropriate for this register (BL Build Supporting Lists Menu Option). The COMPLICATIONS COMPONENT has fields for recording Onset Date and Comments for each complication.

** DIAGNOSES COMPONENT **

This component is for entry of the specific diagnosis or diagnoses that resulted in this patient's inclusion on this register. This is not a field for entering a patient's list of, or history of, diagnoses. For problem-specific registers, such as Diabetes, there is usually only one diagnosis entered. For a Children's Special Needs Register, there might be several diagnoses for a particular child. In order to utilize the DIAGNOSES COMPONENT, you must first build a list of those diagnoses that pertain to this particular register (BL Build Supporting Lists Menu Option). This component also contains fields for entry of Onset Date and Severity for each diagnosis.

** DIAGNOSTIC CRITERIA COMPONENT **

If it is important to document how a diagnosis was arrived at, you may utilize the DIAGNOSTIC CRITERIA COMPONENT to do so. For example, you may wish to specify the objective criteria by which the diagnosis was made. For patients on a Diabetes Register, you may wish to identify one of the following criteria: Two abnormal fasting blood sugars over 140; Non-fasting blood sugar over 200 with classic symptoms; or Abnormal GTT. In order to utilize this component, you must first build a list of diagnostic criteria appropriate for this register (BL Build Supporting Lists Menu Option).

** ETIOLOGY COMPONENT **

The ETIOLOGY COMPONENT is used to identify the cause of the disease that resulted in a patient's inclusion in this register. In order to utilize the ETIOLOGY COMPONENT, you must first build a list of etiologies appropriate for this register (BL Build Supporting Lists Menu Option).

** FAMILY MEMBERS COMPONENT **

The FAMILY MEMBERS COMPONENT is used only for registers pertaining to a health problem for which knowledge of family members is germane, such as breast cancer, diabetes, etc.   Only family members registered on your computer can be entered in this component. For those family members entered, you may enter their relationship to the patient and whether or not they have a diagnosis related to the patient's diagnosis.

** INTERVENTIONS COMPONENT **

The INTERVENTIONS COMPONENT is for recording actions planned or taken by you or others in the care of this patient. You may record type of intervention, date of intervention, results, and date due in the future. Examples of interventions are Diet Education, Smoking Cessation Program, Referral to Specialist, Exercise Program, etc. In order to utilize the INTERVENTIONS COMPONENT, you must first build a list of interventions appropriate for this register (BL Build Supporting Lists Menu Options).

** MEASUREMENT COMPONENT **

You may use the MEASUREMENT COMPONENT for recording the following measurement types:

Abdominal Girth	Pulse
Audiometry	Respiration
Blood Pressure	Temperature
Fundal Height	Tonometry
Fetal Heart Tones	Vision Corrected
Head Circumference	Vision Uncorrected
Hearing	Weight
Height	

You may enter only one of each type measurement for a patient along with the date of the measurement. If a measurement value already exists, you may delete it or replace it with a more current one.

WARNING. It is recommended that you NOT enter measurements in your register that are already collected in the PCC. This creates extra work for you that is not necessary since you have access to data contained in the PCC for each of your register patients.

** MEDICATIONS COMPONENT **

The MEDICATIONS COMPONENT may be used for entering medications the patient is taking which are germane to this register. You may consider using this component to record a class of medications for each patient such as Insulin and Oral Hypoglycemic for a Diabetes Register, rather than recording each specific drug type and strength. You may also enter a SIG (directions) for each drug or class. In order to utilize this component, you must first build a list of drugs or drug classes appropriate for this register.

REMEMBER - Do NOT duplicate all of the meds that are already collected in and available through the PCC.

** RECALL COMPONENT **

The RECALL COMPONENT permits you to establish a future date when you wish to contact the patient for follow-up relevant to this register. These are not appointments, but, rather, are approximate dates, often several months or a year in the future, at which time you wish to contact a patient, often for the purpose of making a specific appointment.

You may enter multiple recall dates for each patient. For each recall, you may enter Purpose, Referral Organization, Referral Provider, Appointment Date, and Appointment Status (Open, Pending, Missed, etc.). You will also be asked to enter a Contact Name (often your own name) and Phone Number to be used in Recall Letters, if you chose to use this capability of the Case Management System.

In Case Management Reports, you can get a list of all patients with Recall Dates in a specified time frame, and, as indicated above, generate Recall Letters to patients.

** REGISTER DATA COMPONENT **

The REGISTER DATA COMPONENT contains basic administrative data about each patient in the register. Available data fields in this component are Patient Status (Active, Inactive, Transient, Unreviewed, Deceased, Non-IHS), Priority, Patient's Primary Provider, Case Manager, Patient's PHN, Facility Where Followed, and a Contact for the Patient. You may utilize any or all of these fields as your needs dictate. The use of Patient Status and Facility Where Followed is recommended. This component is automatically included with all registers.

NOTE: Only those patients identified with a STATUS = ACTIVE will be displayed on all Report Generations, unless you choose to 'Sort By' particular Status.

** RISK FACTORS COMPONENT **

The RISK FACTORS COMPONENT is for medical, social, educational, family, and environmental factors which may affect the care of this patient and/or the progression of the health problem(s) being followed. Examples of risk factors are: Heavy Smoker, Personal Hygiene, Distance from Clinic, Doesn't Speak English, Alcohol in Home, Doesn't Keep Appointments, Poor Diet, etc. In order to utilize the RISK FACTORS COMPONENT, you must first build a list of risk factors appropriate for this register (BL Build Supporting Lists Menu Option).

** SERVICES COMPONENT **

The SERVICES COMPONENT is provided for documenting services required for each patient. These might include podiatry, physical therapy, speech therapy, specialty consultations, etc. To utilize this component, you must first build a list of services that are appropriate for this register (BL Build Supporting List Menu Option).

There is also a field in the SERVICES COMPONENT for recording the availability or status of the services you enter, such as Referral Made, On Waiting List, Unavailable, etc.

```
      **********************************
      **  CASE MANAGEMENT SYSTEM  **

         **          VERSION 2.0           **

      **********************************


                   MAIN MENU


      CR      Create/Modify Register Structure
      AU      Add Authorized Users
      BL      Build Supporting Lists
      DL      Display Supporting Lists ...
      AD      Add/Delete Patients ...
      DE      Data Entry
      RG      Report Generation ...
      RD      Resource Directory ...
      QM      Q-Man (PCC Query Utility)
      DEL     Delete Entire Register
      LTR     Manage Recall Letters ...
              Install IHS Diabetes Register
```

AU   Add Authorized Users

NOTE: It is essential that those Users requiring access to a Register are added as an 'Authorized User' to that specific Register. It is equally important that those who do not need to view register information are prohibited from gaining access. This is accomplished through the process of adding authorized user.

SPECIAL

NOTE: Improved Register Security/Confidentiality has been addressed in the New CMS Package. Only the CREATOR of the Register may (1) Add or Delete an Authorized User for each Register; (2) Modify the existing Register Structure; or (3) Delete that Entire Register.

```
**********************************
**   CASE MANAGEMENT SYSTEM  **
**********************************
      REGISTER SELECTION UTILITY
```

EMPLOYEE HEALTH

REGISTER: **EMPLOYEE HEALTH**

```
**********************************
** EMPLOYEE HEALTH REGISTER   **
**********************************
          AUTHORIZED USERS
```

Select AUTHORIZED USER: **JARLAND,TONI M** TMJ

ARE YOU ADDING 'JARLAND,TONI M' AS A NEW AUTHORIZED USER (THE 1ST FOR THIS CMS REGISTER TYPE)? **Y** (YES)

NOTE: Enter the name of the User you want to add. the name should be in the standard FileMan format; i.e., LAST NAME,FIRST NAME.   You may enter a '?' to obtain a list of existing Users and a list of name choices. The name entered must be a 'User' on the System; ask your Computer Site Manager for assistance if necessary.

```
          **********************************
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            **         VERSION 2.0          **
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     DEL     Delete Entire Register
     LTR     Manage Recall Letters ...
             Install IHS Diabetes Register
```

BL   Build Supporting Lists

NOTE: Only those Register Data Type Components for the Register Selected will be displayed AND only those which require a Table List to be built. For purposes of demonstration, however, ALL Data Type Supporting Lists will be displayed. Since the data entry process is (almost) identical for all data types, we will use the data type to illustrate the DIAGNOSES Build Supporting Lists Menu Option.

SPECIAL

NOTE: "Categories" have been eliminated; only "Lists" have been retained. The Diagnostic Modifiers Component has also been eliminated. There is no longer a linkage between Interventions and the Diagnosis Components. Registers are completely private with all data entered unique to each Register. All Supporting Lists (e.g. Diagnosis, Complications, Interventions, etc.) are now tied to a specific Register so that the 'User' will only see the Lists associated with their specific Register when entering a '?' for choice selection.

```
                        **************************************
                          EMPLOYEE HEALTH REGISTER
                        **************************************
                            LOCAL SYSTEMS SETUP

        1)    DIAGNOSES LIST               6)    MEDICATION LIST
        2)    COMPLICATIONS LIST           7)    RISK FACTORS LIST
        3)    DIAGNOSTIC CRITERIA LIST     8)    SERVICES LIST
        4)    ETIOLOGY LIST                9)    ALL DATA
        5)    INTERVENTION LIST


     To select several options separate them with commas.
     For example:   ==> 1,3,7,9


Select Option(s)==>  **1**
```

```
                        **************************************
                          EMPLOYEE HEALTH REGISTER
                        **************************************
                        DIAGNOSES LIST MANAGEMENT UTILITY


Update DIAGNOSES LIST

DIAGNOSIS: ?

ANSWER WITH CMS DIAGNOSIS LIST ENTRY
DO YOU WANT THE ENTIRE CMS DIAGNOSIS LIST ENTRY LIST? Y  (YES)
CHOOSE FROM:

YOU MAY ENTER A NEW CMS DIAGNOSIS LIST ENTRY, IF YOU WISH
Answer must be 3-30 characters in length.

DIAGNOSIS: **DIABETES**

ARE YOU ADDING 'DIABETES' AS A NEW CMS DIAGNOSIS LIST ENTRY? **Y**  (YES)
```

DIAGNOSIS: **HYPERTENSION**

ARE YOU ADDING 'Hypertension' AS A NEW CMS DIAGNOSIS LIST ENTRY? **Y** (YES)

DIAGNOSIS: **BELLS PALSY**

ARE YOU ADDING 'Bells Palsy' AS A NEW CMS DIAGNOSIS LIST ENTRY? **Y** (YES)

DIAGNOSIS: **?**

CHOOSE FROM:
         DIABETES
         HYPERTENSION
         BELLS PALSY

DIAGNOSIS:

NOTE: Data Entry will only display these 3 Diagnosis List Choices for this particular Register. You will not see
          Diagnosis List Entries from other Registers.

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```
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       **  CASE MANAGEMENT SYSTEM  **
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       **********************************


                    MAIN MENU

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       DEL     Delete Entire Register
       LTR     Manage Recall Letters ...
               Install IHS Diabetes Register
```

DL   Display Supporting Lists

NOTE: The display of Supporting Lists allows the User to print all LIST entries associated with a particular Register. This is provided to display the contents of all Data Type LISTS you established for your Register to ensure that you have the underlying content of each Register.

```
**************************************
         EMPLOYEE HEALTH REGISTER
**************************************
              VERSION 2.0
          SELLS HOSPITAL/CLINIC


          LOCAL OPTION REPORTS
```

SUB MENU . . .

DL   Display Supporting Lists

            CL   Complications List
            LD   Diagnoses List
            CR   Diagnostic Criteria
            SL   Services List
            EL   Etiology List
            AL   Intervention Plan List
            ML   Medications List
            RFL   Risk Factors List

Select Display Supporting Lists Option: **LD   Diagnoses List**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

REPORT EXAMPLE:

```
**************************************
         EMPLOYEE HEALTH REGISTER
**************************************
              DIAGNOSIS LIST


    REPORT DATE:  MAY 12, 1995              PAGE:  1
   -------------------------------------------------------------------------
     DIAGNOSIS                      REGISTER
   ========================================================

     DIABETES                       EMPLOYEE HEALTH
     HYPERTENSION                   EMPLOYEE HEALTH
     BELLS PALSY                    EMPLOYEE HEALTH
```

```
        **********************************
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      QM      Q-Man (PCC Query Utility)
      DEL     Delete Entire Register
      LTR     Manage Recall Letters ...
              Install IHS Diabetes Register
```

AD   Add/Delete Patients

NOTE: Patients may be added manually (one at a time) OR You may select the TX Data transfer from A Search
           Template Menu Option & automatically add all patients in the template at one time.

```
                    ************************************
                    **   CASE MANAGEMENT SYSTEM     **
                    ************************************
                         REGISTER SELECTION UTILITY
```

EMPLOYEE HEALTH

REGISTER: **EMPLOYEE HEALTH**

```
                    ************************************
                         EMPLOYEE HEALTH REGISTER
                    ************************************
                              VERSION 2.0
                           SELLS HOSPITAL/CLINIC


                          PATIENT DATA MANAGEMENT
              SUB MENU . . .
              AD      Add/Delete Patients


                   AP      Add Patient(s)
                   DP      Delete Patients from Register
                   TX      Data Transfer From A Search Template
```

Select Option: **AP   Add Patient(s)**

```
                    ************************************
                         EMPLOYEE HEALTH REGISTER
                    ************************************
```

      Add patient(s) to the EMPLOYEE HEALTH register.

NAME, DOB OR CHART: **GRANT,ABE**   M 05-24-86 065180651   SE 101770

Add ABE GRANT
to the EMPLOYEE HEALTH REGISTER? YES//   **(YES)**

```
                    ************************************
                         EMPLOYEE HEALTH REGISTER
                    ************************************
```

NAME, DOB OR CHART: **SMITH,BOB**   M 02-04-88 071730717   SE 101846

Add BOB SMITH

---

to the EMPLOYEE HEALTH register? YES//   **(YES**)

Would you like to Edit the Data for SMITH,BOB? NO//

NOTE: A 'Yes' entry will allow edit of all Data Type Components for this patient - identical to choosing the DE Data
         Entry Menu Option

NOTE: Be sure you want to delete this patient from the Register. Once, deleted, all data for this particular patient will
         be lost.

```
                     **********************************
                        EMPLOYEE HEALTH REGISTER
                     **********************************
                               VERSION 2.0
                           SELLS HOSPITAL/CLINIC


                        PATIENT DATA MANAGEMENT
     SUB MENU . . .
     AD     Add/Delete Patients

            AP     Add Patient(s)
            DP     Delete Patients from Register
            TX     Data Transfer From A Search Template

Select Option:  DP        **Delete Patient from Register**
```

```
                     **********************************
                        EMPLOYEE HEALTH  REGISTER
                     **********************************
                        PATIENT LOOKUP UTILITY
Select CLIENT
NAME OR CHART:   SMITH,BOB        M 02-04-88 071730717   SE 101846


                        ******  WARNING  ******
```

This procedure will delete ALL data for BOB SMITH from the EMPLOYEE HEALTH register.

Are you certain you want to do this? NO// **Y** (YES)

.........Deletion of BOB SMITH

NOTE: Patients may be added manually (one at a time) through the AP Add Patients Menu Option. However, you may also load all patients from a Template into your Register by utilizing the TX Data Transfer From A Search Template Option.

```
                    **************************************
                          EMPLOYEE HEALTH REGISTER
                    **************************************
                                 VERSION 2.0
                             SELLS HOSPITAL/CLINIC

                          PATIENT DATA MANAGEMENT
           SUB MENU . . .
           AD      Add/Delete Patients

                   AP       Add Patient(s)
                   DP       Delete Patients from Register
                   TX       Data Transfer From A Search Template

Select Add/Delete Patients Option: TX       **Data Transfer From A Search Template**
```

```
                    **************************************
                          EMPLOYEE HEALTH REGISTER
                    **************************************
                        Transfer from SEARCH TEMPLATE
```

Select SEARCH TEMPLATE: **ENTER TEMPLATE NAME HERE**

This will automatically add all the patients in this Template to your Register

There are _____ patients in this SEARCH TEMPLATE.

```
                          REGISTER SELECTION UTILITY
EMPLOYEE HEALTH
```

REGISTER: **EMPLOYEE HEALTH**

Select one of the following:
         A   ACTIVE
         I   INACTIVE
         U   UNREVIEWED

Enter Patient Transfer Status: A// **A**

The following transfer has been selected:

From SEARCH TEMPLATE**: Template Name Would Appear Here**
To CMS register: EMPLOYEE HEALTH REGISTER
Transfer Status: A - ACTIVE

Is that what you want? NO// Y **(YES)**

Transfer of patients will be done in background mode. All patients will be entered as ACTIVE. All cases should be reviewed and all patient data updated in the EMPLOYEE HEALTH register.

```
      **********************************
      **  CASE MANAGEMENT SYSTEM  **

       **          VERSION 2.0           **

      **********************************


                    MAIN MENU

        CR     Create/Modify Register Structure
        AU     Add Authorized Users
        BL     Build Supporting Lists
        DL     Display Supporting Lists ...
        AD     Add/Delete Patients ...
        DE     Data Entry
        RG     Report Generation ...
        RD     Resource Directory ...
        QM     Q-Man (PCC Query Utility)
        DEL    Delete Entire Register
        LTR    Manage Recall Letters ...
               Install IHS Diabetes Register
```

DE   Data Entry Menu

NOTE: Only those Data Type Components for the Register selected will be displayed as Data Entry choice. However, for
          demonstration purposes, all Register Data Type Components will be display.

```
                    ***************************************
                    **    CASE MANAGEMENT SYSTEM     **
                    ***************************************
                          REGISTER SELECTION UTILITY
                              EMPLOYEE HEALTH
```

REGISTER: **EMPLOYEE HEALTH**

Select CLIENT

NAME OR CHART**: GRANT,ABE**   M 05-24-86 065180651   SE 101770

```
                    *******************************************
                    CUSTOMIZE EMPLOYEE HEALTH REGISTER
                    *******************************************
```

          DATA ENTRY
          for ABE GRANT

1)	**REGISTER DATA**	10)	FAMILY MEMBERS
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	12)	MEASUREMENTS
4)	CASE REVIEW DATE	13)	MEDICATIONS
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **1 REGISTER DATA**

NOTE: ** REGISTER DATA COMPONENT **

          The REGISTER DATA COMPONENT contains basic administrative data about each patient in the register.
          Available data fields in this component are Patient Status (Active, Inactive, Transient, Unreviewed, Deceased,
          Non-IHS), Priority, Patient's Primary Provider, Case Manager, Patient's PHN, Facility Where Followed, and a
          Contact for the Patient. You may utilize any or all of these fields as your needs dictate. The use of Patient Status
          and Facility Where Followed is recommended. This component is automatically included with all registers.

          Only those patients identified with a STATUS = ACTIVE will be displayed on all Report Generations, unless you
          choose to 'Sort By' particular Status.

```
************************************
      EMPLOYEE HEALTH REGISTER
************************************
```

Update REGISTER DATA for ABE GRANT
CURRENT STATUS FOR THIS CLIENT

DOB:	MAY 24,1986	AGE:	8 YRS	CHART: 101770
CONTACT:	NOT STATED	COMMUNITY:	SELLS	
STATUS:	ACTIVE	CASE PRIORITY:	NOT STATED	
PRIMARY PRVD:	NONE ASSIGNED	INIT ENTRY:	MAY 12, 1995	
CASE MANAGER:	NONE ASSIGNED	WHERE FLWD:	NOT STATED	
PUB HLTH NRS:	NONE ASSIGNED			

Do you want to update this information? NO// **Y** (YES)

STATUS............: ACTIVE// ?
CHOOSE FROM:
> A   ACTIVE
> I   INACTIVE
> T   TRANSIENT
> U   UNREVIEWED
> D   DECEASED
> N   NON-IHS

STATUS............: ACTIVE// **U** UNREVIEWED
INITIAL ENTRY DATE: MAY 12, 1995//
CASE PRIORITY.....: **?**
> CHOOSE FROM:
> > L   LOW
> > M   MEDIUM
> > H   HIGH
> > C   CRITICAL

CASE PRIORITY: **C** CRITICAL
PRIMARY PROVIDER..: **?**

DO YOU WANT THE ENTIRE 456-ENTRY NEW PERSON LIST?

PRIMARY PROVIDER..:   **DOUGLAS,BILL**
CASE MANAGER......:   **BUTCHER,LORI ANN**
PUBLIC HEALTH NURS.: **JARLAND,TONI M**
WHERE FOLLOWED....: **TUCSON MED CENTER**
CLIENT CONTACT....: **?**
> Answer must be 3-30 characters in length.

CLIENT CONTACT....: **GRANDMOTHER**

```
                   **************************************
                      EMPLOYEE HEALTH REGISTER
                   **************************************


        Update REGISTER DATA
        for ABE GRANT


        CURRENT STATUS FOR THIS CLIENT
------------------------------------------------------------------------------------------------------------------------
--------------
             DOB:  MAY 24,1986                 AGE:  8 YRS              CHART: 101770
         CONTACT:  GRANDMOTHER           COMMUNITY:  SELLS
          STATUS:  UNREVIEWED        CASE PRIORITY   CRITICAL
   PRIMARY PRVD:  DOUGLAS,BILL         INIT ENTRY:  MAY 12, 1995
   CASE MANAGER:  BUTCHER,LORI        WHERE FLWD:  TUCSON MED CTR
   PUB HLTH NRS:  JARLAND,TONI
```

```
                      ************************************
                          EMPLOYEE HEALTH REGISTER
                      ************************************


        DATA ENTRY
        for ABE GRANT

              1)    REGISTER DATA           10)    FAMILY MEMBERS
              2)    CARE PLAN               11)    INTERVENTIONS
              3)    CASE HISTORY            12)    MEASUREMENTS
              4)    CASE REVIEW DATE        13)    MEDICATIONS
              5)    CASE COMMENTS           14)    RISK FACTORS
              6)    COMPLICATIONS           15)    SERVICES
              7)    DIAGNOSES               16)    RECALL DATES
              8)    DIAGNOSTIC CRITERIA     17)    ALL DATA
              9)    ETIOLOGY
```

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **2**   **CARE PLAN**

NOTE: ** CARE PLAN COMPONENT **

          The CARE PLAN COMPONENT consists of six specific plans. They are Medical, Nursing, Social Services,
          Educational, Mental Health, and Other. You may record care plans for any or all of these care plan categories.
          Plans are entered as free text fields of unlimited length.

```
                      ************************************
                          EMPLOYEE HEALTH REGISTER
                      ************************************
```

        Update PLAN OF CARE
        for ABE GRANT

CARE PLAN CATEGORY   CARE PLAN LAST EDITED
--------------------------------------   --
MEDICAL CARE PLAN   *** NO PLAN ON FILE ***
NURSING PLAN   *** NO PLAN ON FILE ***
SOCIAL SERVICES PLAN   *** NO PLAN ON FILE ***
EDUCATIONAL PLAN   *** NO PLAN ON FILE ***
MENTAL HEALTH PLAN   *** NO PLAN ON FILE ***
OTHER PLANS   *** NO PLAN ON FILE ***

SELECT PLAN: **MEDICAL**
PLAN OF CARE:
          1>**This is the Medical Plan of Care Word Processing Field for this Patient.**
          2>**You may record care plans for any or all of the six Care Plans**
          3>**listed above. Plans are entered as free text unlimited length.**

```
**************************************
        EMPLOYEE HEALTH REGISTER
**************************************
```

Update PLAN OF CARE
for ABE GRANT

CARE PLAN CATEGORY	CARE PLAN LAST EDITED
MEDICAL CARE PLAN	*** MAY 15, 1995 ***
NURSING PLAN	*** NO PLAN ON FILE ***
SOCIAL SERVICES PLAN	*** NO PLAN ON FILE ***
EDUCATIONAL PLAN	*** NO PLAN ON FILE ***
MENTAL HEALTH PLAN	*** NO PLAN ON FILE ***
OTHER PLANS	*** NO PLAN ON FILE ***

```
                    ************************************
                         EMPLOYEE HEALTH REGISTER
                    ************************************
          DATA ENTRY
          for AARON JOHNSON


              1)      REGISTER DATA            10)     FAMILY MEMBERS
              2)      CARE PLAN                11)     INTERVENTIONS
              3)      CASE HISTORY             12)     MEASUREMENTS
              4)      CASE REVIEW DATE         13)     MEDICATIONS
              5)      CASE COMMENTS            14)     RISK FACTORS
              6)      COMPLICATIONS            15)     SERVICES
              7)      DIAGNOSES                16)     RECALL DATES
              8)      DIAGNOSTIC CRITERIA      17)     ALL DATA
              9)      ETIOLOGY

To select several options separate them with commas.
For example:  ==> 1,3,7,9

Which Option:  3 CASE HISTORY
```

NOTE: ** CASE HISTORY COMPONENT **

The CASE HISTORY COMPONENT is used to describe the events and factors which lead to the patient's enrollment in the register. This component consists of three fields: Date of Onset, Place of Onset, and Description. The Description field is a text, or word-processing, field of unlimited length. It permits recording information that might not appear in the list of problems or diagnoses found on the PCC Health Summary.

```
                    ************************************
                         EMPLOYEE HEALTH REGISTER
                    ************************************
          Update CASE HISTORY
          for AARON JOHNSON


 ONSET DATE                  PLACE OF ONSET                CASE HISTORY
 ----------------------------     ----------------------------     ----------------------------------



ONSET DATE: T  (JUNE 08, 1995)
PLACE-ONSET: TUCSON,ARIZONA
CASE HISTORY:
          1>THIS IS AARON JOHNSON'S CASE HISTORY WORD PROCESSING
          2>FIELD.  ENTER PERTINENT CASE HISTORY INFORMATION HERE.
          3>
```

```
**************************************
           EMPLOYEE HEALTH REGISTER
**************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	10)	FAMILY MEMBERS
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	12)	MEASUREMENTS
4)	**CASE REVIEW DATE**	13)	MEDICATIONS
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **4** **CASE REVIEW DATE**

NOTE: ** CASE REVIEW DATES COMPONENT **

The CASE REVIEW DATES COMPONENT permits entry of the date you review a patient's case and the date you plan to review it again in the future This component facilitates retrieval of all patients that have not been reviewed in a specified time frame, such as the past year, or those scheduled to be reviewed in a specified time frame, such as next month. The CASE REVIEW DATES COMPONENT is automatically included with every register.

```
**************************************
           EMPLOYEE HEALTH REGISTER
**************************************
```

Update CASE REVIEW DATE
for AARON JOHNSON

LAST REVIEW   NEXT REVIEW
----------------------   ---------------------

LAST REVIEW: **T** (JUNE 08, 1995)

NEXT REVIEW: **AUG 8, 1995**

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	10)	FAMILY MEMBERS
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	12)	MEASUREMENTS
4)	CASE REVIEW DATE	13)	MEDICATIONS
5)	**CASE COMMENTS**	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **5** **CASE COMMENTS**

NOTE: ** COMMENTS COMPONENT **

The COMMENTS COMPONENT is a free text field for entering miscellaneous information that does not easily fit into any of the other component types. Length of the field is unlimited. Despite the free text nature of the field, you can selectively retrieve information from COMMENTS using the Case Management Patient Lister Report. If you know of specific information, or terms, that you wish to retrieve, it is essential that you use the same terminology whenever you enter that term because retrieval will be accomplished by use of a text search. For example, you can find all patients with the term "AMPUTATION" or the term "STAGE IV" if you enter it consistently; i.e., case sensitive The term to be retrieved can be entered anywhere in the COMMENTS text; it does not have to be at the beginning of a line or on a specific line.

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
```

Update CASE COMMENTS
for AARON JOHNSON

CASE COMMENTS:
 1>**THIS IS AARON JOHNSON'S CASE COMMENTS WORD PROCESSING FIELD**
 2>**ENTER PERTINENT INFORMATION RELATIVE TO ALL CASE COMMENTS.**
 3>

```
        ************************************
              EMPLOYEE HEALTH REGISTER
        ************************************
DATA ENTRY
for AARON JOHNSON

        1)      REGISTER DATA          10)     FAMILY MEMBERS
        2)      CARE PLAN              11)     INTERVENTIONS
        3)      CASE HISTORY           12)     MEASUREMENTS
        4)      CASE REVIEW DATE       13)     MEDICATIONS
        5)      CASE COMMENTS          14)     RISK FACTORS
        6)      COMPLICATIONS          15)     SERVICES
        7)      DIAGNOSES              16)     RECALL DATES
        8)      DIAGNOSTIC CRITERIA    17)     ALL DATA
        9)      ETIOLOGY

To select several options separate them with commas.
For example:  ==> 1,3,7,9

Which Option:  6 COMPLICATIONS
```

NOTE: ** COMPLICATIONS COMPONENT **

The COMPLICATIONS COMPONENT is utilized for identifying complications associated with the diagnosis or health problems for which a patient was entered into this register. For a diabetes register, for example, complications might include amputations, diabetic retinopathy, diabetic nephropathy, etc. In order to utilize the COMPLICATIONS COMPONENT, you must first build a list of complications that are appropriate for this register (BL Build Supporting Lists Menu Option). The COMPLICATIONS COMPONENT has fields for recording Onset Date and Comments for each complication.

```
                    *************************************
                        EMPLOYEE HEALTH REGISTER
                    *************************************


        Update COMPLICATIONS
        for AARON JOHNSON


 COMPLICATIONS         ONSET DT      ST COMMENTS
 --------------------  ------------  ------------------------


COMPLICATION: ?
 ANSWER WITH CMS COMPLICATION LIST ENTRY REGISTER
 DO YOU WANT THE ENTIRE CMS COMPLICATION LIST ENTRY LIST? Y  (YES)
CHOOSE FROM:
        AMPUTATIONS
        DIABETIC NEPHROPATHY
        DIABETIC RETINOPATHY
        HIGH BLOOD PRESSURE
        HTN
        SMOKER


COMPLICATION: HTN


ONSET DATE: T (JUNE 08, 1995)
STATUS: ?
 ANSWER WITH CMS COMPLICATIONS STATUS COMPLICATION STATUS
 DO YOU WANT THE ENTIRE 11-ENTRY CMS COMPLICATIONS STATUS LIST? Y  (YES)
CHOOSE FROM:
        A   NO RISK
        B   LOW RISK
        C   MODERATE RISK
        D   HIGH RISK
        E   EARLY SIGNS
        F   IMMINENT ONSET
        G   MILD INVOLVEMENT
        H   MODERATE INVOLVE
        I   SEVERE INVOLVE
        J   CONDITION PRSNT
        K   END STAGE


STATUS: A - NO RISK
COMMENTS:
 1>THIS IS THE COMPLICATION COMMENTS WORD PROCESSING FIELD.
 2>ENTER ANY PERTINENT INFORMATION RELATIVE TO AARON JOHNSON'S
 3>COMPLICATION OF HYPERTENSION  (HTN) HERE.
 4>
```

```
            ***************************************
                  EMPLOYEE HEALTH REGISTER
            ***************************************
       DATA ENTRY
       for AARON JOHNSON

          1)     REGISTER DATA          10)    FAMILY MEMBERS
          2)     CARE PLAN              11)    INTERVENTIONS
          3)     CASE HISTORY           12)    MEASUREMENTS
          4)     CASE REVIEW DATE       13)    MEDICATIONS
          5)     CASE COMMENTS          14)    RISK FACTORS
          6)     COMPLICATIONS          15)    SERVICES
          7)     DIAGNOSES              16)    RECALL DATES
          8)     DIAGNOSTIC CRITERIA    17)    ALL DATA
          9)     ETIOLOGY

To select several options separate them with commas.
For example:  ==> 1,3,7,9

Which Option:  7 DIAGNOSIS
```

NOTE: ** DIAGNOSES COMPONENT **

This component is for entry of the specific diagnosis or diagnoses that resulted in this patient's inclusion on this register. This is not a field for entering a patient's list of, or history of, diagnoses. For problem-specific registers, such as Diabetes, there is usually only one diagnosis entered. For a Children's Special Needs Register, there might be several diagnoses for a particular child. In order to utilize the DIAGNOSES COMPONENT, you must first build a list of those diagnoses that pertain to this particular register (BL Build Supporting Lists Menu Option). This component also contains fields for entry of Onset Date and Severity for each diagnosis.

```
            ***************************************
                  EMPLOYEE HEALTH REGISTER
            ***************************************
       Update DIAGNOSES
       for AARON JOHNSON
DIAGNOSES        ONSET DATE  SEVERITY
-----------------------------   --------------------------------
DIAGNOSIS: ??
CHOOSE FROM:
       CHRONIC RENAL FAILURE
       DIABETES MELLITUS TYPE II
       HTN
       OTITIS MEDIA
DIAGNOSIS: OTITIS MEDIA
ONSET DATE: T  (JUN 08, 1995)
SEVERITY: ??
CHOOSE FROM:
       N       NORMAL
       M       MILD
       MO      MODERATE
       S       SEVERE
```

```
*************************************
      EMPLOYEE HEALTH REGISTER
*************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	10)	FAMILY MEMBERS
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	12)	MEASUREMENTS
4)	CASE REVIEW DATE	13)	MEDICATIONS
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	**DIAGNOSTIC CRITERIA**	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **8**   **DIAGNOSTIC CRITERIA**

NOTE: ** DIAGNOSTIC CRITERIA COMPONENT **

If it is important to document how a diagnosis was arrived at, you may utilize the DIAGNOSTIC CRITERIA
COMPONENT to do so. For example, you may wish to specify the objective criteria by which the diagnosis was
made. For patients on a Diabetes Register, you may wish to identify one of the following criteria: Two abnormal
fasting blood sugars over 140; Non-fasting blood sugar over 200 with classic symptoms; or Abnormal GTT. In
order to utilize this component, you must first build a list of diagnostic criteria appropriate for this register (BL
Build Supporting Lists Menu Option).

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
```

Update DIAGNOSTIC CRITERIA
for AARON JOHNSON

DIAGNOSTIC CRITERIA   DATE ESTABLISHED
------------------------------------   ---------------------------------

CRITERION: **??**

CHOOSE FROM:
     ABNORMAL GTT
     FASTING BLOOD SUGARS > 140
     NON-FASTING BLOOD SUGARS > 200
     POSITIVE PPD

CRITERION: **ABNORMAL GTT**

```
            ************************************
                EMPLOYEE HEALTH REGISTER
            ************************************


    DATA ENTRY
    for AARON JOHNSON


        1)      REGISTER DATA           10)     FAMILY MEMBERS
        2)      CARE PLAN               11)     INTERVENTIONS
        3)      CASE HISTORY            12)     MEASUREMENTS
        4)      CASE REVIEW DATE        13)     MEDICATIONS
        5)      CASE COMMENTS           14)     RISK FACTORS
        6)      COMPLICATIONS           15)     SERVICES
        7)      DIAGNOSES               16)     RECALL DATES
        8)      DIAGNOSTIC CRITERIA     17)     ALL DATA
        9)      ETIOLOGY
```

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **9**ETIOLOGY

NOTE: ** ETIOLOGY COMPONENT **

The ETIOLOGY COMPONENT is used to identify the cause of the disease that resulted in a patient's inclusion in this register. In order to utilize the ETIOLOGY COMPONENT, you must first build a list of etiologies appropriate for this register (BL Build Supporting Lists Menu Option).

```
            ************************************
                EMPLOYEE HEALTH REGISTER
            ************************************


    Update ETIOLOGY
    for AARON JOHNSON
```

ETIOLOGY

ETIOLOGY: ?

CHOOSE FROM:
        ENVIRONMENTAL CAUSES
        GENETICS

ETIOLOGY: ENVIRONMENTAL CAUSES

```
**************************************
         EMPLOYEE HEALTH REGISTER
**************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	**10)**	**FAMILY MEMBERS**
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	12)	MEASUREMENTS
4)	CASE REVIEW DATE	13)	MEDICATIONS
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **10**   **FAMILY MEMBERS**

NOTE: ** FAMILY MEMBERS COMPONENT **

The FAMILY MEMBERS COMPONENT is used only for registers pertaining to a health problem for which knowledge of family members is germane, such as breast cancer, diabetes, etc. Only family members registered on your computer can be entered in this component. For those family members entered, you may enter their relationship to the patient and whether or not they have a diagnosis related to the patient's diagnosis.

```
**************************************
         EMPLOYEE HEALTH REGISTER
**************************************
```

Update FAMILY MEMBERS
for AARON JOHNSON

FAMILY MEMBER	CHART	RELATION	RELATED DX
---------------------------	-----------	---------------	--------------------

FAMILY MEMBER: **GRANT,ABE**   M 05-24-86 065180651 SE 101770

RELATIONSHIP: **FATHER**
        1 FATHER
        2 FATHER-IN-LAW
CHOOSE 1-2: **2**

RELATED DX: **??**
CHOOSE FROM:
        Y   YES
        N   NO
        U   UNK
RELATED DX: **YES**

```
*************************************
         EMPLOYEE HEALTH REGISTER
*************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	10)	FAMILY MEMBERS
2)	CARE PLAN	**11)**	**INTERVENTIONS**
3)	CASE HISTORY	12)	MEASUREMENTS
4)	CASE REVIEW DATE	13)	MEDICATIONS
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **11**   **INTERVENTIONS**

NOTE: ** INTERVENTIONS COMPONENT **

The INTERVENTIONS COMPONENT is for recording actions planned or taken by you or others in the care of this patient. You may record type of intervention, date of intervention, results, and date due in the future. Examples of interventions are Diet Education, Smoking Cessation Program, Referral to Specialist, Exercise Program, etc. In order to utilize the INTERVENTIONS COMPONENT, you must first build a list of interventions appropriate for this register (BL Build Supporting Lists Menu Options).

```
           **************************************
                  EMPLOYEE HEALTH REGISTER
           **************************************


        Update INTERVENTIONS
        for AARON JOHNSON

INTERVENTION           RESULTS               RESULT DATE              NEXT DATE DUE
--------------------------   ----------------------------   ----------------------------   ----------------------------

INTERVENTION: **??**

CHOOSE FROM:
        DIET EDUCATION
        EXERCISE PROGRAM
        PHYSICAL THERAPY
        REFERRAL TO SPECIALIST
        SMOKING CESSATION PROGRAM

INTERVENTION: **DIET EDUCATION**

RESULTS: **MINIMAL**

RESULTS DATE: **T**  (JUNE 08, 1995)
```

```
****************************************
           EMPLOYEE HEALTH REGISTER
****************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	10)	FAMILY MEMBERS
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	**12)**	**MEASUREMENTS**
4)	CASE REVIEW DATE	13)	MEDICATIONS
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **12**   **MEASUREMENTS**

NOTE: ** MEASUREMENT COMPONENT **

You may use the MEASUREMENT COMPONENT for recording the following measurement types:

Abdominal Girth	Pulse
Audiometry	Respiration
Blood Pressure	Temperature
Fundal Height	Tonometry
Fetal Heart Tones	Vision Corrected
Head Circumference	Vision Uncorrected
Hearing	Weight
Height	

You may enter only one of each type measurement for a patient along with the date of the measurement. If a measurement value already exists, you may delete it or replace it with a more current one.

WARNING: It is recommended that you NOT enter measurements in your register that are already collected in the PCC. This creates extra work for you that is not necessary since you have access to data contained in the PCC for each of your register patients.

Update MEASUREMENTS
for AARON JOHNSON

MEASUREMENTS   VALUE   DATE
--------------------------   -----------------------

 MEASUREMENT: **??**

CHOOSE FROM:
AG	ABDOMINAL GIRTH
AUD	AUDIOMETRY
BP	BLOOD PRESSURE
FH	FUNDAL HEIGHT
FT	FETAL HEART TONES
HC	HEAD CIRCUMFERENCE
HE	HEARING
HT	HEIGHT
PU	PULSE
RS	RESPIRATIONS
TMP	TEMPERATURE
TON	TONOMETRY
VC	VISION CORRECTED
VU	VISION UNCORRECTED
WT	WEIGHT

MEASUREMENT: **WT**   WEIGHT

VALUE: **250**

DATE OF MEASUREMENT: **TODAY**

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	10)	FAMILY MEMBERS
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	12)	MEASUREMENTS
4)	CASE REVIEW DATE	**13)**	**MEDICATIONS**
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	15)	SERVICES
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **13**   **MEDICATIONS**

NOTE: ** MEDICATIONS COMPONENT **

The MEDICATIONS COMPONENT may be used for entering medications the patient is taking which are germane to this register. You may consider using this component to record a class of medications for each patient such as Insulin and Oral Hypoglycemics for a Diabetes Register, rather than recording each specific drug type and strength. You may also enter a SIG (directions) for each drug or class. In order to utilize this component, you must first build a list of drugs or drug classes appropriate for this register.

REMEMBER - Do NOT duplicate all of the meds that are already collected in and available through the PCC.

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
```

Update MEDICATIONS
for AARON JOHNSON

MEDICATIONS   SIG
--------------------------------   --------------------

MEDICATION: **??**

CHOOSE FROM:
        INSULIN
        ORAL HYPOGLYCEMICS

MEDICATION: **INSULIN**

SIGS: **WEEKLY**

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************


DATA ENTRY
for AARON JOHNSON


          1)    REGISTER DATA              10)    FAMILY MEMBERS
          2)    CARE PLAN                  11)    INTERVENTIONS
          3)    CASE HISTORY               12)    MEASUREMENTS
          4)    CASE REVIEW DATE           13)    MEDICATIONS
          5)    CASE COMMENTS              **14)   RISK FACTORS**
          6)    COMPLICATIONS              15)    SERVICES
          7)    DIAGNOSES                  16)    RECALL DATES
          8)    DIAGNOSTIC CRITERIA        17)    ALL DATA
          9)    ETIOLOGY
```

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: **14**   **RISK FACTORS**

NOTE: ** RISK FACTORS COMPONENT **

The RISK FACTORS COMPONENT is for medical, social, educational, family, and environmental factors which may affect the care of this patient and/or the progression of the health problem(s) being followed. Examples of risk factors are: Heavy Smoker, Personal Hygiene, Distance from Clinic, Doesn't Speak English, Alcohol in Home, Doesn't Keep Appointments, Poor Diet, etc. In order to utilize the RISK FACTORS COMPONENT, you must first build a list of risk factors appropriate for this register (BL Build Supporting Lists Menu Option).

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
```

Update RISK FACTORS
for AARON JOHNSON

RISK FACTORS

RISK FACTOR: ??

CHOOSE FROM:
        ALCOHOL IN HOME
        DISTANCE FROM CLINIC
        DOESN'T KEEP APPOINTMENTS
        DOESN'T SPEAK ENGLISH
        HEAVY SMOKER
        PERSONAL HYGIENE
        POOR DIET
RISK FACTOR: DISTANCE FROM CLINIC

```
***************************************
          EMPLOYEE HEALTH REGISTER
***************************************
```

DATA ENTRY
for AARON JOHNSON

1)	REGISTER DATA	10)	FAMILY MEMBERS
2)	CARE PLAN	11)	INTERVENTIONS
3)	CASE HISTORY	12)	MEASUREMENTS
4)	CASE REVIEW DATE	13)	MEDICATIONS
5)	CASE COMMENTS	14)	RISK FACTORS
6)	COMPLICATIONS	**15)**	**SERVICES**
7)	DIAGNOSES	16)	RECALL DATES
8)	DIAGNOSTIC CRITERIA	17)	ALL DATA
9)	ETIOLOGY		

To select several options separate them with commas.
For example: ==> 1,3,7,9

Which Option: __15__   **SERVICES**

NOTE: ** SERVICES COMPONENT **

The SERVICES COMPONENT is provided for documenting services required for each patient. These might include podiatry, physical therapy, speech therapy, specialty consultations, etc. To utilize this component, you must first build a list of services that are appropriate for this register (BL Build Supporting List Menu Option).

There is also a field in the SERVICES COMPONENT for recording the availability or status of the services you enter, such as Referral Made, On Waiting List, Unavailable, etc.

```
****************************************
EMPLOYEE HEALTH REGISTER
****************************************
```

Update SERVICES
for AARON JOHNSON

SERVICES NEEDED BY THIS CLIENT   AVAILABILITY STATUS
---   ------------------------------------

SERVICE: ??

CHOOSE FROM:
　　　　PHYSICAL THERAPY
　　　　PODIATRY
　　　　SPECIALTY CONSULTATIONS
　　　　SPEECH THERAPY

SERVICE: PHYSICAL THERAPY

AVAILABILITY: ??

CHOOSE FROM:
　　　　F　　FUTURE F/U
　　　　R　　REFERRED
　　　　E　　ENROLLED
　　　　W　　WAITING LIST
　　　　N　　UNAVAILABLE

AVAILABILITY:　　　REFERRED

```
                    *************************************
                          EMPLOYEE HEALTH REGISTER
                    *************************************

        DATA ENTRY
        for AARON JOHNSON

              1)    REGISTER DATA            10)    FAMILY MEMBERS
              2)    CARE PLAN                11)    INTERVENTIONS
              3)    CASE HISTORY             12)    MEASUREMENTS
              4)    CASE REVIEW DATE         13)    MEDICATIONS
              5)    CASE COMMENTS            14)    RISK FACTORS
              6)    COMPLICATIONS            15)    SERVICES
              7)    DIAGNOSES                16)    RECALL DATES
              8)    DIAGNOSTIC CRITERIA      17)    ALL DATA
              9)    ETIOLOGY

To select several options separate them with commas.
For example:  ==> 1,3,7,9


Which Option:  16          RECALL DATES
```

NOTE: ** RECALL COMPONENT **

The RECALL COMPONENT permits you to establish a future date when you wish to contact the patient for follow-up relevant to this register. These are not appointments, but, rather, are approximate dates, often several months or a year in the future, at which time you wish to contact a patient, often for the purpose of making a specific appointment.

You may enter multiple recall dates for each patient. For each recall, you may enter Purpose, Referral Organization, Referral Provider, Appointment Date, and Appointment Status (Open, Pending, Missed, etc.). You will also be asked to enter a Contact Name (often your own name) and Phone Number to be used in Recall Letters, if you chose to use this capability of the Case Management System.

In Case Management Reports, you can get a list of all patients with Recall Dates in a specified time frame, and, as indicated above, generate Recall Letters to patients.

```
        **************************************
               EMPLOYEE HEALTH REGISTER
        **************************************


        Update RECALL DATES
        for AARON JOHNSON


                                   NEXT APPT          REFERRAL
NO.  RECALL DT        PURPOSE      DATE   TIME        ORG/PROVIDER
----------------------  --------------  ----------------------  ----------------------
Select one of the following:

A      ADD

Enter CHOICE: ADD
Enter Date of Recall: T+30  (JULY 08, 1995)

Purpose of Recall: ANNUAL CHECKUP
Contact Person: MRS. BETH JOHNSON
Contact Phone Number: 470-6870
Referral Organization: INDIAN HEALTH SERVICE
Referral Provider: DR. SMITH
Next Appt: T+30  (JULY 08, 1995)
Appointment Status: ??

 CHOOSE FROM:
        K        KEPT
        M        MISSED
        O        OPEN
Appointment Status: OPEN
```

```
             ************************************
             **  CASE MANAGEMENT SYSTEM  **

             **          VERSION 2.0          **

             ************************************


                        MAIN MENU

    CR      Create/Modify Register Structure
    AU      Add Authorized Users
    BL      Build Supporting Lists
    DL      Display Supporting Lists ...
    AD      Add/Delete Patients ...
    DE      Data Entry
    RG      Report Generation ...
    RD      Resource Directory ...
    QM      Q-Man (PCC Query Utility)
    DEL     Delete Entire Register
    LTR     Manage Recall Letters ...
            Install IHS Diabetes Register
```

```
               ***************************************
                     EMPLOYEE HEALTH REGISTER
               ***************************************
                           VERSION 2.0
                       SELLS HOSPITAL/CLINIC


               PATIENT AND STATISTICAL REPORT GENERATION


        SUB MENU . . .

        RG        Report Generation


                CS      Case Summary, Individual
                MS      Case Summary, Multiple
                ML      Master List
                PR      Patient and Statistical Reports
                GEN     Register Patient General Retrieval (Lister)
                LVST    Display Data for a Patient's Last Visit
```

Select Report Generation Option: **CS   Case Summary, Individual**

NOTE: Individual Health Summaries are one of the most frequently used reports. This report, similar to the PCC Health
         Summary report, displays all patient data for the each of the selected 16 Data Type Component for your
         Customized Register.

         In addition, you are given the opportunity to print the PCC HEALTH SUMMARY report, along with the selected
         Patient's CMS Case Summary, if desired.

```
               ***************************************
                     EMPLOYEE HEALTH REGISTER
               ***************************************
                     PATIENT LOOKUP UTILITY
        Select CLIENT
```

NAME OR CHART: **GRANT,ABE**   M 05-24-86 065180651 SE 101770

Include PCC HEALTH SUMMARY? NO// **NO**

DEVICE**:   Enter a Device Number; or Hit Return To Display To Screen**

```
              ////---INDIVIDUAL CASE SUMMARY REPORT DISPLAY---////
        *************************EMPLOYEE HEALTH REGISTER*************************
        CLIENT: CHART:  GRANT,ABE                          CHART:   101770
                  DOB:  MAY 24,1986                          AGE:   9 YRS
              CONTACT:  MOTHER                          COMMUNITY:   SELLS
               STATUS:  ACTIVE                      CASE PRIORITY:   LOW
        PRIMARY PRVD:   DOUGLAS,BILL                    INIT ENTRY:   JUL 1,1994
        CASE MANAGER:   JONES,BOB                       WHERE FLWD:   SELLS HOSP
```

PUB HLTH NRS: BUTCHER,LORI ANN
*********************** PLAN OF CARE ***************************
*********************** CASE HISTORY ***************************
ONSET DATE: 12/17/94 PLACE OF ONSET: TUCSON
CASE HX: THIS IS THE CASE HISTORY FOR PATIENT ABE GRANT
*********************** COMMENTS ******************************
THIS IS CASE COMMENTS SECTION FOR ABE GRANT.
*********************** COMPLICATIONS *************************

COMPLICATION	ONSET DATE	STATUS
LASER TX FOR RETINOPATHY	01/01/95	A - NO RISK
CVA	07/09/95	A - NO RISK
SMOKER	06/09/50	A - HIGH RISK

*********************** REGISTER DIAGNOSES ********************

DIAGNOSIS	DX DATE	SEVERITY
BELLS PALSY	11/16/94	NORMAL
HYPERTENSION	2/22/94	SEVERE

*********************** DIAGNOSTIC CRITERIA ******************
2 FBS OVER 200   DATE ESTABLISHED: DEC 19,1994
*********************** ETIOLOGY ******************************
ETIOLOGY
EXPOSURE TO TOXIC MATERIALS
*********************** FAMILY MEMBERS ************************
GRANT,HELEN 102706 COUSIN
SMITH,BOB   101846 FATHER-IN-LAW
***********************INTERVENTION PLAN **********************

INTERVENTION	LAST DATE	RESULTS	DATE DUE
DIET INTERVENTION	2/29/94	MINIMAL	01/08/95

*********************** MEASUREMENTS *************************

MEASUREMENT	VALUE	MEASUREMENT DATE
BP	135/100	02/02/95
WT	250	02/02/95

*********************** REGISTER MEDICATIONS ******************
INSULIN   WEEKLY
TYLENOL   AS NEEDED FOR PAIN
*********************** RISK FACTORS *************************
AMPUTATED FOOT
*********************** SERVICES ******************************
OCCUPATIONAL THERAPY   UNAVAILABLE
WEIGHT WATCHERS   ENROLLED
*********************** RECALL DATES **************************

RECALL DATE:	PURPOSE:	STATUS	NXT DATE/TIME
06/06/95	ANNUAL CHECKUP	OPEN	08/01/95

*********************** CASE REVIEW DATES ********************
LAST REVIEW DATE: DEC 19,1994 NEXT REVIEW DATE: JAN 18, 1995
End of report for ABE GRANT

```
             *************************************
                      TONI TEST REGISTER
             *************************************
                         VERSION 2.0
                    SELLS HOSPITAL/CLINIC
```

SUB MENU . . .

RG   Report Generation

PATIENT AND STATISTICAL REPORT GENERATION

    CS   Case Summary, Individual
    MS   **Case Summary, Multiple**
    ML   Master List
    PR   Patient and Statistical Reports
    GEN   Register Patient General Retrieval (Lister)
    LVST Display Data for a Patient's Last Visit

Select Report Generation Option: **MS** **Case Summary, Multiple**

NOTE: When you need to produce the CMS Case Summary on several patients, use the MS Case summary, Multiple option.

          This report is identical to the Individual Case Summaries, but will produce Summaries for multiple patients, based upon the 'Sorting Option Choice'; i.e., Case Manager, Current Community, Next Case Review, and Where Followed. Review these screens carefully - and the method of setting up your sorts for your reports should become easy to use.

          In addition, you are given the opportunity to print the PCC HEALTH SUMMARY report, along with the selected Patient's CMS Case Summary, if desired.

```
             *************************************
                      TONI TEST REGISTER
             *************************************
                   REPORT SORTING UTILITY
```

The MULTIPLE SUMMARIES report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

    1) CASE MANAGER   4) PATIENT
    2) CURRENT COMMUNITY   5) WHERE FOLLOWED
    3) NEXT CASE REVIEW

Your choice: **1**   **CASE MANAGER**

Do you want to sort by a particular CASE MANAGER? NO// **YES**

Which CASE MANAGER: **DOUGLAS,BILL**

Within CASE MANAGER, want to sort by another attribute? NO// **NO**

Store Report Result as Search Template? NO// **NO**

Include PCC HEALTH SUMMARY? NO// **NO**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

NOTE: This selection would produce Individual Case Summaries for all Patient's who's Case Manager is Bill Douglas.

```
             *************************************
                  EMPLOYEE HEALTH REGISTER
             *************************************
                        VERSION 2.0
                    SELLS HOSPITAL/CLINIC


             PATIENT AND STATISTICAL REPORT GENERATION


       SUB MENU . . .

       RG      Report Generation


            CS      Case Summary, Individual
            MS      Case Summary, Multiple
            ML      Master List
            PR      Patient and Statistical Reports
            GEN     Register Patient General Retrieval (Lister)
            LVST    Display Data for a Patient's Last Visit


Select Report Generation Option:  ML  Master List
```

NOTE: The Master List is similar to the PR Patient and Statistical Reports Option. The 'Sort Choices' will depend upon the Data Type Component you choose through the "Sorting Process'.

You will also be given the choice to save the report results in a Template. Creation of Templates may now be run in the background mode. A description of a Template may be generated on a printer or terminal screen, producing a brief listing containing the Register Name, Template Name, Creator of the Template and the number of entries (hits) in the Template.

Only those patients identified with a STATUS=ACTIVE will appear on the Master List, unless you 'Sort By' a particular Status.

You may utilize this Template within the Q-Man Query Software Package to access all PCC demographic and/or clinical data.

```
             *************************************
                  EMPLOYEE HEALTH REGISTER
             *************************************
                   REPORT SORTING UTILITY
```

The MASTER LIST report can be sorted by one or more of the following attributes.

'<==' indicates a mandatory selection.

```
            1) AGE                    4) PUBLIC HEALTH NURSE
            2) CASE MANAGER           5) SEX
            3) CURRENT COMMUNITY      6) STATUS
```

Your choice: 5   SEX

Do you want to sort by a particular SEX? NO// Y (YES)

You may select one of the following choices

```
        M =     MALE
        F  =    FEMALE
```

Your choice: **F** = **FEMALE**

Within SEX, want to sort by another attribute? NO// **Y** **(YES)**

   The MASTER LIST report can be sorted by one or more of the following attributes.

   '<==' indicates a mandatory selection.

```
              1) AGE                    4) PUBLIC HEALTH NURSE
              2) CASE MANAGER           5) SEX
              3) CURRENT COMMUNITY      6) STATUS
```

   Sorting by: SEX

Your choice: **3**   **CURRENT COMMUNITY**

Do you want to sort by a particular CURRENT COMMUNITY? NO//   **(NO)**

Within CURRENT COMMUNITY, want to sort by another attribute? NO//   **(NO)**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

                    ////===MASTER LIST REPORT DISPLAY===///

```
                    **************************************
                        EMPLOYEE HEALTH REGISTER
                    **************************************
                               MASTER LIST
                 SORTED BY: SEX, then CURRENT COMMUNITY
```

REPORT DATE JUNE 8, 1995   PAGE: 1

CHART   PATIENT   CASE MANAGER   NEXT REVIEW

==

SEX: FEMALE
PATIENT:CURRENT COMMUNITY: COCKLEBURR
101702 ADAMS,DANIELLE
PATIENT:CURRENT COMMUNITY: RIPLEY
100018 ROBERTS,DIANE   05/05/95
100420 ADAMS,CANDY   06/05/95

```
**************************************
```
EMPLOYEE HEALTH REGISTER
```
**************************************
```
VERSION 2.0
SELLS HOSPITAL/CLINIC

PATIENT AND STATISTICAL REPORT GENERATION

SUB MENU . . .

RG   Report Generation

      CS   Case Summary, Individual
      MS   Case Summary, Multiple
      ML   Master List
      PR   Patient and Statistical Reports
      GEN   Register Patient General Retrieval (Lister)
      LVST   Display Data for a Patient's Last Visit

Select Option: **PR Patient and Statistical Reports**

NOTE: The screen you will see in your Register will include only the reports for the Data Type
Components you selected when you customized your Register. For demonstration purposes, ALL
Data Type Components will be displayed.

The 'Sort Choices' will depend upon the Data Type Component you choose through the 'Sorting
Process'. You will also be given the choice of producing either the 'P' Patient or "S" Statistical
print display. The 'P' Patient choice displays all detail related to the Data Type Component
selected; the 'S' Statistical choice displays only the count of hits for the Data Type Component
selected.

You will also be given the choice to save the report results in a Template. Creation of Templates
may now be run in the background mode. A description of a Template may be generated on a
printer or terminal screen, producing a brief listing containing the Register Name, Template
Name, Creator of the Template, and the number of entries (hits) in the Template.

Only those patients identified with a STATUS=ACTIVE will on all Report Generations, unless
you 'Sort By' a particular Status; i.e., Active, Inactive, Transient, Unreviewed, Deceased, or Non-
IHS.

For demonstration purposes, an example of each of the 16 Data Type Components is provided,
along with a Report Display example. All report outputs vary, depending upon the User's 'Sort
Selection Choice'.

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC


PATIENT AND STATISTICAL REPORT GENERATION
```

1)	**RECALL DATES**	9)	ETIOLOGY
2)	CARE PLAN	10)	FAMILY MEMBERS
3)	CASE HISTORY	11)	INTERVENTIONS
4)	CASE REVIEW DATE	12)	MEASUREMENTS
5)	CASE COMMENTS	13)	MEDICATIONS
6)	COMPLICATIONS	14)	REGISTER DATA
7)	DIAGNOSES	15)	RISK FACTORS
8)	DIAGNOSTIC CRITERIA	16)	SERVICES

Report Option ==> **1**   **RECALL DATES**

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
REPORT SORTING UTILITY
```

The RECALL DATES report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

1) APPOINTMENT STATUS	5) PATIENT
2) CASE MANAGER	6) PUBLIC HEALTH NURSE
3) CURRENT COMMUNITY	7) RECALL DATES
4) NEXT APPOINTMENT DATE	8) WHERE FOLLOWED

Your choice: **7**   **RECALL DATES**

Start with date: **1-1-95**   Enter a Date Here
End with date: **1-1-95**

Within RECALL DATES, want to sort by another attribute? NO// **NO**

'Patient or 'Statistical report? ==> **P** Patient

Store Report Result as Search Template? NO// **NO**   You may save in a Template to get a Count of Hits for future Use.

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
**************************************
        EMPLOYEE HEALTH REGISTER
**************************************
            RECALL DATES


        SORTED BY: RECALL DATE
```

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	RECALL DATE	PURPOSE	S - NXT APPT
3061	ADAMS,ROSE	JAN 1, 1995	ANNUAL CHECKUP	O MAY 13, 1995
101770	GRANT,ABE	JAN 1, 1995	FOLLOWUP APPT	K FEB 13, 1995
9999	GRANT,SAM	JAN 1, 1995	DIABETES CLINIC	
5656	SMITH,GRANT	JAN 1, 1995	FOOT EXAM	M

```
         **************************************
                EMPLOYEE HEALTH REGISTER
         **************************************
                     VERSION 2.0
                  SELLS HOSPITAL/CLINIC


            PATIENT AND STATISTICAL REPORT GENERATION
```

1)	RECALL DATES	9)	ETIOLOGY
2)	**CARE PLAN**	10)	FAMILY MEMBERS
3)	CASE HISTORY	11)	INTERVENTIONS
4)	CASE REVIEW DATE	12)	MEASUREMENTS
5)	CASE COMMENTS	13)	MEDICATIONS
6)	COMPLICATIONS	14)	REGISTER DATA
7)	DIAGNOSES	15)	RISK FACTORS
8)	DIAGNOSTIC CRITERIA	16)	SERVICES

Report Option ==> **2**   **CARE PLAN**

```
         **************************************
                EMPLOYEE HEALTH REGISTER
         **************************************
                 REPORT SORTING UTILITY
```

The CARE PLAN report can be sorted by one or more of the following attributes.
 '<==' indicates a mandatory selection.

1) CURRENT COMMUNITY	4) PATIENT
2) NEXT APPOINTMENT DATE	5) WHERE FOLLOWED
3) NEXT CASE REVIEW	

Your choice: **4**   **PATIENT**

Do you want to sort by a particular PATIENT? NO// **(NO)**

Within PATIENT, want to sort by another attribute? NO// **(NO)**

Store Report Result as Search Template? NO// **YES**

TEMPLATE: **TMJ PATIENT CARE PLANS**

> Enter the name of a Template Here. It is recommended ALL Template Names begin with your Initials, which will assist in identifying only your templates for future Use.

ARE YOU ADDING 'TEMPLATE NAME' AS A NEW TEMPLATE? **YES**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

```
************************************
    EMPLOYEE HEALTH REGISTER
************************************
            CARE PLANS
```

SORTED BY: PATIENT

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	REGISTER	CATEGORY	LAST UPDATE
3061 PLAN OF CARE:	ADAMS,ROSE	EMPLOYEE HEALTH	EDUCATIONAL	MAY 13, 1995
101770 PLAN OF CARE:	GRANT,ABE	EMPLOYEE HEALTH	EDUCATIONAL	MAY 09, 1995
101770 PLAN OF CARE:	GRANT,ABE	EMPLOYEE HEALTH	SOCIAL SERVICES	MAY 11, 1995
101770 PLAN OF CARE:	GRANT,ABE	EMPLOYEE HEALTH	MENTAL HEALTH	MAY 01, 1995

This is Abe Grant's Plan of Care for the Mental Health Care Plan Category. Mr. Grant will benefit greatly from this Care Plan.

VERSION 2.0
SELLS HOSPITAL/CLINIC

PATIENT AND STATISTICAL REPORT GENERATION

1)	RECALL DATES	9)	ETIOLOGY
2)	CARE PLAN	10)	FAMILY MEMBERS
3)	**CASE HISTORY**	11)	INTERVENTIONS
4)	CASE REVIEW DATE	12)	MEASUREMENTS
5)	CASE COMMENTS	13)	MEDICATIONS
6)	COMPLICATIONS	14)	REGISTER DATA
7)	DIAGNOSES	15)	RISK FACTORS
8)	DIAGNOSTIC CRITERIA	16)	SERVICES

Report Option ==> **3**   **CASE HISTORY**

```
*************************************
```
EMPLOYEE HEALTH REGISTER
```
*************************************
```
REPORT SORTING UTILITY

The CASE HISTORY report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

1) PATIENT

Your choice: **1**   **PATIENT**

Do you want to sort by a particular PATIENT? NO// **(NO)**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
```

CASE HISTORY

SORTED BY: PATIENT

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	REGISTER	ONSET DATE	PLACE OF ONSET
3061	ADAMS,ROSE	EMPLOYEE HEALT	04/15/95	ARIZONA
101770	GRANT,ABE	EMPLOYEE HEALT	03/01/90	
101770	GRANT,ABE	EMPLOYEE HEALT	07/04/49	
101770	GRANT,ABE	EMPLOYEE HEALT	05/05/95	RESERVATION

PLAN OF CARE:

This is Abe Grant's Case History. The Class/Stage are no longer a part of the Data Entry Fields. Place of Onset is a Free-Text Field of the Case History Component. Mr. Grant will benefit greatly from this pertinent information.

```
            **************************************
            EMPLOYEE HEALTH REGISTER
            **************************************
                     VERSION 2.0
                 SELLS HOSPITAL/CLINIC


         PATIENT AND STATISTICAL REPORT GENERATION

     1)    RECALL DATES              9)    ETIOLOGY
     2)    CARE PLAN                 10)   FAMILY MEMBERS
     3)    CASE HISTORY              11)   INTERVENTIONS
     4)    CASE REVIEW DATE          12)   MEASUREMENTS
     5)    CASE COMMENTS             13)   MEDICATIONS
     6)    COMPLICATIONS             14)   REGISTER DATA
     7)    DIAGNOSES                 15)   RISK FACTORS
     8)    DIAGNOSTIC CRITERIA       16)   SERVICES
```

Report Option ==> **4**   **CASE REVIEW DATE**

```
            **************************************
            EMPLOYEE HEALTH REGISTER
            **************************************
                 REPORT SORTING UTILITY
```

The CASE REVIEW DATES report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

  1) CASE MANAGER   4) PATIENT
  2) CURRENT COMMUNITY   5) RECALL DATES
  3) NEXT CASE REVIEW DATE   6) WHERE FOLLOWED

Your choice: **3**   **NEXT CASE REVIEW DATE**

Start with date: **1-1-95**   Enter a Date Here
End with date: **1-1-95**

Within NEXT CASE REVIEW DATE, want to sort by another attribute? NO// **NO**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

You may save in a Template to get a Count of Hits for future Use.

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

```
************************************
      EMPLOYEE HEALTH REGISTER
************************************
            RECALL DATES


        SORTED BY: RECALL DATE
```

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	CASE MANAGER	LAST REVIEW	NEXT REVIEW
3061	ADAMS,ROSE	DOUGLAS,BILL	03/16/94	01/01/95
101770	GRANT,ABE	DOUGLAS,BILL	12/12/94	01/01/95
9999	GRANT,SAM	JOHNSON,DOCTOR		01/01/95
5656	SMITH,GRANT	SMITH,JAMES	10/31/94	01/01/95

```
***************************************
         EMPLOYEE HEALTH REGISTER
***************************************
                VERSION 2.0
            SELLS HOSPITAL/CLINIC


      PATIENT AND STATISTICAL REPORT GENERATION

     1)   RECALL DATES          9)    ETIOLOGY
     2)   CARE PLAN            10)    FAMILY MEMBERS
     3)   CASE HISTORY         11)    INTERVENTIONS
     4)   CASE REVIEW DATE     12)    MEASUREMENTS
     5)   CASE COMMENTS        13)    MEDICATIONS
     6)   COMPLICATIONS        14)    REGISTER DATA
     7)   DIAGNOSES            15)    RISK FACTORS
     8)   DIAGNOSTIC CRITERIA  16)    SERVICES
```

Report Option ==> **5**   **CASE COMMENTS**

```
***************************************
         EMPLOYEE HEALTH REGISTER
***************************************
           REPORT SORTING UTILITY
```

The CASE COMMENTS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

     1) PATIENT

```
***************************************
         EMPLOYEE HEALTH REGISTER
***************************************
                VERSION 2.0
            SELLS HOSPITAL/CLINIC
```

Your choice: **1**   **PATIENT**

Do you want to sort by a particular PATIENT? NO// **(NO)**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

```
************************************
       EMPLOYEE HEALTH REGISTER
************************************
            CASE COMMENTS

          SORTED BY: PATIENT
```

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART   PATIENT
===

3061   ADAMS,ROSE

101770   GRANT,ABE
             This is Abe Grant's Case Comments Field. This is a word processing Field
             which has limitless text to describe, in detail, comments relative to the case.

3991   ADAMS,DONALD

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC


PATIENT AND STATISTICAL REPORT GENERATION


    1)    RECALL DATES            9)    ETIOLOGY
    2)    CARE PLAN              10)    FAMILY MEMBERS
    3)    CASE HISTORY           11)    INTERVENTIONS
    4)    CASE REVIEW DATE       12)    MEASUREMENTS
    5)    CASE COMMENTS          13)    MEDICATIONS
    6)    COMPLICATIONS          14)    REGISTER DATA
    7)    DIAGNOSES              15)    RISK FACTORS
    8)    DIAGNOSTIC CRITERIA    16)    SERVICES
```

Report Option ==> **6**   **COMPLICATIONS**

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
REPORT SORTING UTILITY
```

The COMPLICATIONS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

1) AGE   5) PATIENT
2) COMPLICATION   6) SEX
3) COMPLICATION STATUS   7) WHERE FOLLOWED
4) CURRENT COMMUNITY

Your choice: **2** **COMPLICATION**

Do you want to sort by a particular COMPLICATION? NO// **YES**

Which COMPLICATION: **HTN**

                        Enter the desired Complication Here
                        Entering a '?' will display Choices

Within COMPLICATION, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P**   Patient

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
```

COMPLICATIONS

SORTED BY: COMPLICATION

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	COMPLICATION
3061	ADAMS,ROSE	HTN
		DIABETIC
		RETINOPATHY
100018	ROBERTS,DIANE	HTN

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC


PATIENT AND STATISTICAL REPORT GENERATION
```

1)	RECALL DATES	9)	ETIOLOGY
2)	CARE PLAN	10)	FAMILY MEMBERS
3)	CASE HISTORY	11)	INTERVENTIONS
4)	CASE REVIEW DATE	12)	MEASUREMENTS
5)	CASE COMMENTS	13)	MEDICATIONS
6)	COMPLICATIONS	14)	REGISTER DATA
7)	**DIAGNOSES**	15)	RISK FACTORS
8)	DIAGNOSTIC CRITERIA	16)	SERVICES

Report Option ==> **7**   **DIAGNOSIS**

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
REPORT SORTING UTILITY
```

The DIAGNOSES report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

1) AGE		5) SEVERITY
2) CURRENT COMMUNITY		6) SEX
3) DIAGNOSIS		7) WHERE FOLLOWED
4) PATIENT		

Your choice: **3**   **DIAGNOSIS**

Do you want to sort by a particular DIAGNOSIS? NO// **Y**

Which DIAGNOSIS**: CHRONIC RENAL FAILURE**   Enter the desired Complication Here
                                                        Entering a '?' will display Choices

Within DIAGNOSIS, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

```
************************************
       EMPLOYEE HEALTH REGISTER
************************************
          PATIENT DIAGNOSES

         SORTED BY: DIAGNOSIS
```

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	DIAGNOSIS	DX DATE	SEVERITY
3061	ADAMS,ROSE	CHRONIC RENAL FAILURE	10/27/94	NORMAL
9999	SMITH,JOHN	CHRONIC RENAL FAILURE	01/27/93	SEVERE

```
                    ************************************
                        EMPLOYEE HEALTH REGISTER
                    ************************************
                              VERSION 2.0
                          SELLS HOSPITAL/CLINIC


              PATIENT AND STATISTICAL REPORT GENERATION

         1)    RECALL DATES            9)    ETIOLOGY
         2)    CARE PLAN               10)   FAMILY MEMBERS
         3)    CASE HISTORY            11)   INTERVENTIONS
         4)    CASE REVIEW DATE        12)   MEASUREMENTS
         5)    CASE COMMENTS           13)   MEDICATIONS
         6)    COMPLICATIONS           14)   REGISTER DATA
         7)    DIAGNOSES               15)   RISK FACTORS
         8)    DIAGNOSTIC CRITERIA     16)   SERVICES
```

Report Option ==> **8**   **DIAGNOSTIC CRITERIA**

```
                    ************************************
                        EMPLOYEE HEALTH REGISTER
                    ************************************
                              VERSION 2.0
                          SELLS HOSPITAL/CLINIC


                         REPORT SORTING UTILITY
```

The DIAGNOSTIC CRITERIA report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

1) DIAGNOSTIC CRITERIA   2) PATIENT

Your choice: **1**   **DIAGNOSTIC CRITERIA**

Do you want to sort by a particular DIAGNOSTIC CRITERIA? NO// **YES**

Which DIAGNOSTIC CRITERIA: **ABNORMAL GTT**   Enter the desired Complication Here
                                                   Entering a '?' will display Choices

Within DIAGNOSTIC CRITERIA, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

```
************************************
```
EMPLOYEE HEALTH REGISTER
```
************************************
```
VERSION 2.0
SELLS HOSPITAL/CLINIC

PATIENT'S DIAGNOSTIC CRITERIA

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	CRITERIA	ESTABLISHED
018	ROBERTS,DIANE	ABNORMAL GTT	04/00/91

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC


PATIENT AND STATISTICAL REPORT GENERATION

        1)    RECALL DATES              9)    ETIOLOGY
        2)    CARE PLAN                10)    FAMILY MEMBERS
        3)    CASE HISTORY             11)    INTERVENTIONS
        4)    CASE REVIEW DATE         12)    MEASUREMENTS
        5)    CASE COMMENTS            13)    MEDICATIONS
        6)    COMPLICATIONS            14)    REGISTER DATA
        7)    DIAGNOSES                15)    RISK FACTORS
        8)    DIAGNOSTIC CRITERIA      16)    SERVICES
```

Report Option ==> **9   ETIOLOGY**

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
REPORT SORTING UTILITY
```

The ETIOLOGY report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

        1) AGE   3) PATIENT
        2) ETIOLOGY   4) SEX

Your choice: **2   ETIOLOGY**

Do you want to sort by a particular ETIOLOGY? NO// **Y**

Which ETIOLOGY: **ENVIRONMENTAL CAUSES**   Enter the desired Complication Here
                                                  Entering a '?' will display Choices

Within ETIOLOGY, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P   Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
```

ETIOLOGY REPORT

SORTED BY: ETIOLOGY

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	ETIOLOGY
3061	ADAMS,ROSE	ENVIRONMENTAL CAUSES

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC


PATIENT AND STATISTICAL REPORT GENERATION
```

1)	RECALL DATES	9)	ETIOLOGY
2)	CARE PLAN	**10)**	**FAMILY MEMBERS**
3)	CASE HISTORY	11)	INTERVENTIONS
4)	CASE REVIEW DATE	12)	MEASUREMENTS
5)	CASE COMMENTS	13)	MEDICATIONS
6)	COMPLICATIONS	14)	REGISTER DATA
7)	DIAGNOSES	15)	RISK FACTORS
8)	DIAGNOSTIC CRITERIA	16)	SERVICES

Report Option ==> **10**   **FAMILY MEMBERS**

```
*************************************
EMPLOYEE HEALTH REGISTER
*************************************
REPORT SORTING UTILITY
```

The FAMILY MEMBERS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

      1) CURRENT COMMUNITY   3) WHERE
      2) PATIENT

Your choice: **2**   **PATIENT**

Do you want to sort by a particular PATIENT? NO// **NO**

Within PATIENT, want to sort by another attribute? NO// **NO**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
**************************************
```
EMPLOYEE HEALTH REGISTER
```
**************************************
```
FAMILY MEMBERS

SORTED BY: PATIENT

REPORT DATE: MAY 15, 1995   PAGE: 1

CLIENT	RELTD FAMILY MEMBER	RELATIONSHIP	DX
ADAMS,ROSE	ADAMS,BRYAN	BROTHER	UNKNOWN
GRANT,ABE	GRANT,COLLEEN	MOTHER	YES
ROBERTS,DIANE	ROBERTS,BARRY	BROTHER	NO

```
                 ************************************
                      EMPLOYEE HEALTH REGISTER
                 ************************************
                            VERSION 2.0
                        SELLS HOSPITAL/CLINIC

                PATIENT AND STATISTICAL REPORT GENERATION

        1)    RECALL DATES            9)    ETIOLOGY
        2)    CARE PLAN              10)    FAMILY MEMBERS
        3)    CASE HISTORY           11)    INTERVENTIONS
        4)    CASE REVIEW DATE       12)    MEASUREMENTS
        5)    CASE COMMENTS          13)    MEDICATIONS
        6)    COMPLICATIONS          14)    REGISTER DATA
        7)    DIAGNOSES              15)    RISK FACTORS
        8)    DIAGNOSTIC CRITERIA    16)    SERVICES
```

Report Option ==> **11**   **INTERVENTIONS**

```
                 ************************************
                      EMPLOYEE HEALTH REGISTER
                 ************************************
                        REPORT SORTING UTILITY
```

The INTERVENTIONS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

```
              1) INTERVENTIONS          3) PATIENT
              2) NEXT CASE REVIEW        4) SEX
```

Your choice: **3** **PATIENT**

Do you want to sort by a particular PATIENT? NO// **(NO)**

Within PATIENT, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

****
EMPLOYEE HEALTH REGISTER
****
INTERVENTION REPORT

SORTED BY: PATIENT

REPORT DATE: MAY 15, 1995   PAGE: 1

PATIENT	INTERVENTION	DATE DUE	RESULT DT	RESULTS
ADAMS,ROSE	PHYSICAL THERAPY	05/08/95	04/30/95	POSITIVE
ROBERTS,DIANE	EXERCISE PROGRAM	05/10/95	04/15/95	GOOD

```
              ************************************
                 EMPLOYEE HEALTH REGISTER
              ************************************
                        VERSION 2.0
                   SELLS HOSPITAL/CLINIC

           PATIENT AND STATISTICAL REPORT GENERATION

        1)   RECALL DATES            9)   ETIOLOGY
        2)   CARE PLAN              10)   FAMILY MEMBERS
        3)   CASE HISTORY           11)   INTERVENTIONS
        4)   CASE REVIEW DATE       12)   MEASUREMENTS
        5)   CASE COMMENTS          13)   MEDICATIONS
        6)   COMPLICATIONS          14)   REGISTER DATA
        7)   DIAGNOSES              15)   RISK FACTORS
        8)   DIAGNOSTIC CRITERIA    16)   SERVICES
```

Report Option ==> **12**   **MEASUREMENTS**

```
              ************************************
                 EMPLOYEE HEALTH REGISTER
              ************************************
                   REPORT SORTING UTILITY
```

The MEASUREMENTS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

```
        1) MEASUREMENT DATE          3) PATIENT
        2) MEASUREMENT TYPE          4) SEX
```

Your choice: **4**   **SEX**

Do you want to sort by a particular SEX? NO// **(NO)**

Within SEX, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
**************************************
```
EMPLOYEE HEALTH REGISTER
```
**************************************
```
MEASUREMENTS

REPORT DATE: MAY 15, 1995   PAGE: 1

CHART	PATIENT	MEASUREMENT	VALUE	DATE OF MEASUREMENT
	SEX: FEMALE			
100018	ROBERTS,DIANE	VC	10/10	01/01/95
100018	ROBERTS,DIANE	HT	64.75	01/01/95
100018	ROBERTS,DIANE	TON	/7.5/800.0	02/02/95
100018	ROBERTS,DIANE	WT	135	04/01/95
	SEX: MALE			
100018	SMART,MAXWELL	VC	10/10	01/01/95
100018	SMITH,ROBERT	HT	64.75	01/01/95
100018	HANSON,WAYNE	TON	/7.5/800.0	02/02/95
100018	JONES,BOB	WT	135	04/01/95

```
                    *************************************
                        EMPLOYEE HEALTH REGISTER
                    *************************************
                              VERSION 2.0
                          SELLS HOSPITAL/CLINIC

                  PATIENT AND STATISTICAL REPORT GENERATION

         1)     RECALL DATES            9)     ETIOLOGY
         2)     CARE PLAN               10)    FAMILY MEMBERS
         3)     CASE HISTORY            11)    INTERVENTIONS
         4)     CASE REVIEW DATE        12)    MEASUREMENTS
         5)     CASE COMMENTS           13)    MEDICATIONS
         6)     COMPLICATIONS           14)    REGISTER DATA
         7)     DIAGNOSES               15)    RISK FACTORS
         8)     DIAGNOSTIC CRITERIA     16)    SERVICES
```

Report Option ==> **13**   **MEDICATIONS**

```
                    *************************************
                        EMPLOYEE HEALTH REGISTER
                    *************************************
                          REPORT SORTING UTILITY
```

 The MEDICATIONS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

```
            1) MEDICATION              3) SEX
            2) PATIENT
```

Your choice: **2**   **PATIENT**

Do you want to sort by a particular PATIENT? NO// **(NO)**

Within PATIENT, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
************************************
```
EMPLOYEE HEALTH REGISTER
```
************************************
```
MEDICATIONS

SORTED BY: PATIENT

REPORT DATE: MAY 15, 1995			PAGE: 1
CHART	PATIENT	MEDICATION	SIG
3061	ADAMS,ROSE	INSULIN	WEEKLY
101770	GRANT,ABE	TYLENOL	50 MG
101770	GRANT,ABE	INSULIN	DAILY

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC

PATIENT AND STATISTICAL REPORT GENERATION
```

1)	RECALL DATES	9)	ETIOLOGY
2)	CARE PLAN	10)	FAMILY MEMBERS
3)	CASE HISTORY	11)	INTERVENTIONS
4)	CASE REVIEW DATE	12)	MEASUREMENTS
5)	CASE COMMENTS	13)	MEDICATIONS
6)	COMPLICATIONS	**14)**	**REGISTER DATA**
7)	DIAGNOSES	15)	RISK FACTORS
8)	DIAGNOSTIC CRITERIA	16)	SERVICES

Report Option == > **14**   **REGISTER DATA**

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
REPORT SORTING UTILITY
```

The REGISTER DATA report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

1) CURRENT COMMUNITY	5) SEX
2) NEXT APPOINTMENT DATE	6) STATUS
3) NEXT CASE REVIEW FOLLOWED	7) WHERE
4) PUBLIC HEALTH NURSE	

Your choice: **6**   **STATUS**

Do you want to sort by a particular STATUS? NO// **(NO)**

Within STATUS, want to sort by another attribute? NO// **(NO)**

Store Report Result as Search Template? NO//

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
********************** REGISTER STATUS DATA **********************
CLIENT:  GRANT,ABE                 CHART: 101770
FOLLOWD: TUCSON MEDICAL CE   DOB: 05/24/86          AGE: 9 YRS
PROVIDR: DOUGLAS,BILL    STATUS: ACTIVE          PRIORITY: HIGH
     MGR: DOUGLAS,BILL   PHN: JARLAND,TONI M      COMM: SELLS


********************** REGISTER STATUS DATA **********************
 CLIENT:  ADAMS,ROSE        CHART: 3061
FOLLOWD: SAN XAVIER HEALTH   DOB: 01/01/62          AGE: 33 YRS
PROVIDR: CURTIS,CLAYTON  STATUS: ACTIVE          PRIORITY: MEDIUM
     MGR: MONTOUR,VINA J.      PHN: BUTCHER,LORI ANN     COMM: SELLS


********************** REGISTER STATUS DATA **********************
 CLIENT:  ROBERTS,DIANE       CHART: 100018
FOLLOWD: SELLS HOSPITAL/CL   DOB: 05/11/97    AGE: 98 YRS
PROVIDR:                      STATUS: ACTIVE    PRIORITY:
     MGR:                     PHN:                      COMM: RIPLEY
```

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC

PATIENT AND STATISTICAL REPORT GENERATION

        1)    RECALL DATES          9)    ETIOLOGY
        2)    CARE PLAN            10)    FAMILY MEMBERS
        3)    CASE HISTORY         11)    INTERVENTIONS
        4)    CASE REVIEW DATE     12)    MEASUREMENTS
        5)    CASE COMMENTS        13)    MEDICATIONS
        6)    COMPLICATIONS        14)    REGISTER DATA
        7)    DIAGNOSES            15)    RISK FACTORS
        8)    DIAGNOSTIC CRITERIA  16)    SERVICES
```

Report Option ==> **15**   **RISK FACTORS**

```
************************************
EMPLOYEE HEALTH REGISTER
************************************
REPORT SORTING UTILITY
```

The RISK FACTORS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

        1) AGE   4) SEX
        2) PATIENT   5) WHERE FOLLOWED
        3) RISK FACTOR

Your choice: **2**   **PATIENT**

Do you want to sort by a particular PATIENT? NO// **(NO)**

Within PATIENT, want to sort by another attribute? NO// **(NO)**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

```
************************************
     EMPLOYEE HEALTH REGISTER
************************************
    RISK FACTORS FOR THE PATIENT


        SORTED BY: PATIENT
```

REPORT DATE: MAY 15, 1995		PAGE: 1
CHART	PATIENT	FACTORS
3061	ADAMS,ROSE	POOR DIET
100018	ROBERTS,DIANE	DISTANCE FROM CLINIC
100018	ROBERTS,DIANE	DOESN'T KEEP APPOINTMENTS

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC


PATIENT AND STATISTICAL REPORT GENERATION

       1)    RECALL DATES              9)    ETIOLOGY
       2)    CARE PLAN                 10)   FAMILY MEMBERS
       3)    CASE HISTORY              11)   INTERVENTIONS
       4)    CASE REVIEW DATE          12)   MEASUREMENTS
       5)    CASE COMMENTS             13)   MEDICATIONS
       6)    COMPLICATIONS             14)   REGISTER DATA
       7)    DIAGNOSES                 15)   RISK FACTORS
       8)    DIAGNOSTIC CRITERIA       16)   SERVICES
```

Report Option == > **16** **SERVICES**

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
REPORT SORTING UTILITY
```

The SERVICES report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

       1) AGE   5) SERVICE AVAILABILITY
       2) CURRENT COMMUNITY   6) SEX
       3) PATIENT   7) WHERE FOLLOWED
       4) SERVICE

Your choice: **3**   **PATIENT**

Do you want to sort by a particular PATIENT? NO//   **(NO)**

Within PATIENT, want to sort by another attribute? NO//   **(NO)**

'Patient or 'Statistical report? ==> **P**   **Patient**

Store Report Result as Search Template? NO// **NO**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

```
************************************
         EMPLOYEE HEALTH REGISTER
************************************
          PATIENTS BY SERVICE

          SORTED BY: PATIENT
```

REPORT DATE: MAY 15, 1995			PAGE: 1
CHART	PATIENT	SERVICE	STATUS
3061	ADAMS,ROSE	PHYSICAL THERAPY	ENROLLED
3061	ADAMS,ROSE	SPECIALTY CONSULTATIONS	WAITING LIST
100018	ROBERTS,DIANE	PODIATRY	FUTURE F/U

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
VERSION 2.0
SELLS HOSPITAL/CLINIC


PATIENT AND STATISTICAL REPORT GENERATION
```

SUB MENU . . .

RG   Report Generation

        CS   Case Summary, Individual
        MS   Case Summary, Multiple
        ML   Master List
        PR   Patient and Statistical Reports
        GEN   Register Patient General Retrieval (Lister)
        LVST   Display Data for a Patient's Last Visit

Select Report Generation Option: **GEN Register Patient General Retrieval (Lister)**

CASE MANAGEMENT REGISTER PATIENT GENERAL RETRIEVAL

This report will produce a listing of Patients on a Register selected by the user. You will be asked (in three separate steps) to identify your selection criteria; what you wish displayed for each patient; and the sorting order for your list. You may save the logic used to produce the report for future use. If you design a report that is 80 characters or less in width, it can be displayed on your screen or printed. If your report is 81-132 characters wide, it must be printed - and only on a printer capable of producing 132 character lines.

REGISTER: EMPLOYEE HEALTH   USER: JARLAND,TONI M

The Patients displayed can be selected based on any of the following criteria:

1) Patient Name	14) Medicaid Eligibility	27) Case History
2) Patient Sex	15) Priv Ins Eligibility	28) Interventions
3) Patient DOB	16) PCC Designated Provider	29) Care Plan
4) Patient Age	17) Register Status	30) Care-Plan Comment
5) Patient DOD	18) Case Priority	31) Complications
6) Living Patients	19) Case Manager	32) Complication Comment
7) Chart Facility	20) PHN	33) Diagnoses
8) Patient Community	21) Last Review Date	34) Date of Onset
9) Patient Tribe	22) Next Review Date	35) Etiology
10) Eligibility Status	23) Where PT Followed	36) Risk Factors
11) Class/Beneficiary	24) Date Last Edited	37) Medications
12) Cause of Death	25) Case Comments	38) Services
13) Medicare Eligibility	26) Primary Provider	

<Enter a list or a range. E.g. 1-4,5,20 or 10,12,20,30>
<<HIT RETURN to conclude selections or bypass screens>>

Select Patients based on which of the above: (1-38): **19**   19) Case Manager Selection.

ENTER Case Manager: **DOUGLAS,BILL**

CMS REGISTER PATIENT Selection Criteria:
      Case Manager: DOUGLAS,BILL

Would you like to select additional PATIENT criteria? NO// **NO**

Select one of the following:
      T   Total Count Only
      S   Sub-counts and Total Count
      D   Detailed Patient Listing

Choose Type of Report: D// **D**   **Detailed Patient Listing**

REGISTER: EMPLOYEE HEALTH USER: JARLAND,TONI M
                PRINT Data Items Menu

The following data items can be printed. You can use up to 132 characters.
Choose the data items in the order you want them printed.

Total Report width (including column margins - 2 spaces): 0

1)	Patient Name	17)	Medicare Eligibility	33)	Case History
2)	Patient Chart #	18)	Medicaid Eligibility	34)	Interventions
3)	Patient Sex	19)	Priv Ins Eligibility	35)	Care Plan
4)	Patient SSN	20)	Patient's Last Visit	36)	Care-Plan Comment
5)	Patient DOB	21)	PCC Designated Provider	37)	Complications
6)	Patient Age	22)	Register Status	38)	Complication Comment
7)	Patient DOD	23)	Case Priority	39)	Diagnoses
8)	Mailing Address-Street	24)	Case Manager	40)	Date of Onset
9)	Mailing Address-City	25)	PHN	41)	Etiology
10)	Home Phone	26)	Last Review Date	42)	Family Members
11)	Mother's Name	27)	Next Review Date	43)	Risk Factors
12)	Patient Community	28)	Where PT Followed	44)	Medications
13)	Patient Tribe	29)	Date Last Edited	45)	Services
14)	Eligibility Status	30)	Case Comments		
15)	Class/Beneficiary	31)	Client Contact		
16)	Cause of Death	32)	Primary Provider		

<Enter a list or a range. E.g. 1-4,5,18 or 10,12,18,30>
<<HIT RETURN to conclude selections or '^' to exit>>

Select print item(s): (1-45): **1,2,3,4,24**

      Total Report width (including column margins - 2 spaces): 0
Enter Column width for Patient Name (suggested: 20): (2-80): 20//

      Total Report width (including column margins - 2 spaces):   22
Enter Column width for Patient Chart # (suggested: 8): (2-80): 8//

      Total Report width (including column margins - 2 spaces):   32
Enter Column width for Patient Sex (suggested: 6): (2-80): 6//

Total Report width (including column margins - 2 spaces):   40
Enter Column width for Patient SSN (suggested: 11): (2-80): 11//

Total Report width (including column margins - 2 spaces):   53
Enter Column width for Case Manager (suggested: 20): (2-80): 20//

PRINT Items Selected:
       Patient Name - column width 20
       Patient Chart # - column width 8
       Patient Sex - column width 6
       Patient SSN - column width 11
       Case Manager - column width 20

Total Report width (including column margins - 2 spaces): 75

REGISTER: EMPLOYEE HEALTH   USER: JARLAND,TONI M

The Patients displayed can be SORTED by any one of the following:

1)	Patient Name	12)	Patient DOD
2)	Patient Age	13)	Register Status
3)	Patient Community	14)	Last Review Date
4)	Patient Sex	15)	Next Review Date
5)	Patient Tribe	16)	Date Last Edited
6)	Patient Chart #	17)	Case Priority
7)	PCC Designated Provider	18)	Case Manager
8)	Classification/Beneficiary	19)	PHN
9)	Eligibility Status	20)	Where PT Followed
10)	Cause of Death	21)	Primary Provider
11)	Patient DOB		

<<If you don't select a sort criteria the report will be sorted by Patient Name.>>

Sort Patients by which of the above: (1-21): **RETURN KEY**

No sort criteria selected ... will sort by Patient Name
Would you like a custom title for this report? N// **NO**

REPORT SUMMARY

CMS REGISTER PATIENT Selection Criteria:
Case Manager: DOUGLAS,BILL

PRINT Items Selected:
       Patient Name - column width 20
       Patient Chart # - column width 8
       Patient Sex - column width 6
       Patient SSN - column width 11
       Case Manager - column width 20

Total Report width (including column margins - 2 spaces): 75

CMS REGISTER PATIENT SORTING Criteria:
CMS REGISTER PATIENTS will be sorted by: Patient Name

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

/////-- CASE MANAGEMENT PATIENT REGISTER LISTING REPORT DISPLAY---/////

REPORT REQUESTED BY: JARLAND,TONI M

REGISTER: EMPLOYEE HEALTH

The following report contains a Patient report based on the following criteria:

PATIENT Selection Criteria
        Case Manager: DOUGLAS,BILL

PRINT Field Selection
        Patient Name (20)
        Patient Chart # (8)
        Patient Sex (6)
        Patient SSN (11)
        Case Manager (20)
                TOTAL column width: 75

Patients will be SORTED by: Patient Name

CASE MANAGEMENT PATIENT LISTING   Page 1
EMPLOYEE HEALTH REGISTER

PATIENT NAME	HRN	CASE MGR	SEX	SSN	DOB	AGE
ADAMS,AANDA	99999	DOUGLAS,BILL	FEMALE	077-38-0473	SEP 19, 1991	4
ADAMS,ANDY	88888	DOUGLAS,BILL	FEMALE	077-19-0781	JAN 3, 1989	6
ADAMS,LAURA	77777	DOUGLAS,BILL	FEMALE	077-66-0746	JULY 6, 1988	6
ADAMS,MAUDE	66666	DOUGLAS,BILL	FEMALE	067-68-0696	JULY 26, 1987	7
ADAMS,WILMA	55555	DOUGLAS,BILL	FEMALE	077-50-0755	AUG 29, 1988	6
BROEN,DON	44444	DOUGLAS,BILL	MALE	077-27-0792	FEB 28, 1989	6

```
                    ************************************
                         EMPLOYEE HEALTH REGISTER
                    ************************************
                              VERSION 2.0
                           SELLS HOSPITAL/CLINIC


                    PATIENT AND STATISTICAL REPORT GENERATION


             SUB MENU . . .

             RG      Report Generation

                     CS      Case Summary, Individual
                     MS      Case Summary, Multiple
                     ML      Master List
                     PR      Patient and Statistical Reports
                     GEN     Register Patient General Retrieval (Lister)
                     LVST    Display Data for a Patient's Last Visit


Select Report Generation Option:  LVST    Display Data for a Patient's Last Visit


Select PATIENT NAME:   GRANT,ABE        M 05-24-86 065180651   SE 101770


DEVICE: Enter a Device Number or; Hit Return Key to Display to Screen


         ////----DISPLAY DATA FOR A PATIENT'S LAST VISIT REPORT DISPLAY---////
```

```
                    -----------------------------  VISIT FILE   -----------------------------
VISIT/ADMIT DATE & TIME:  APR 17, 1995@12:00
   DATE VISIT CREATED:  APR 17, 1995      TYPE: IHS
   PATIENT NAME: GRANT,ABE                          LOC. OF ENCOUNTER: SELLS HOSPITAL/CLINIC
   SERVICE CATEGORY: AMBULATORY      CLINIC: MENTAL HEALTH
   DEPENDENT ENTRY COUNT: 3                     DATE LAST MODIFIED: APR 17, 1995
   WALK IN/APPT: WALK IN


                    ----------------------------  V PROVIDER   ----------------------------
PROVIDER: JARLAND,TONI M           PATIENT NAME: GRANT,ABE
   VISIT: APR 17, 1995@12:00        PRIMARY/SECONDARY: PRIMARY
AFF.DISC.CODE (c): 119TJ
                    ----------------------------  V POV   ----------------------------
POV: V61.20                        PATIENT NAME: GRANT,ABE
   VISIT: APR 17, 1995@12:00
   PROVIDER NARRATIVE:             PARENT-CHILD PROBLEM NOS
ICD NARRATIVE (c:                  PARENT-CHILD PROBLEM NOS


                    ----------------------------  V ACTIVITY TIME  ----------------------------
ACTIVITY TIME: 20                  PATIENT NAME: GRANT,ABE
   VISIT: APR 17, 1995@12:00
TOTAL TIME (c): 20
```

```
VISIT EIN:  72247
End of visit display, <RETURN> to Continue
```

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```
*********************************
** CASE MANAGEMENT SYSTEM **
  **        VERSION 2.0        **
*********************************


            MAIN MENU

   CR      Create/Modify Register Structure
   AU      Add Authorized Users
   BL      Build Supporting Lists
   DL      Display Supporting Lists ...
   AD      Add/Delete Patients ...
   DE      Data Entry
   RG      Report Generation ...
   RD      Resource Directory ...
   QM      Q-Man (PCC Query Utility)
   DEL     Delete Entire Register
   LTR     Manage Recall Letters ...
           Install IHS Diabetes Register
```

```
                        ************************************
                        **   CASE MANAGEMENT SYSTEM     **
                        ************************************
                                 VERSION 2.0
                             SELLS HOSPITAL/CLINIC

                          RESOURCE DIRECTORY LISTING
```

         SUB MENU . . .
         RD   Resource Directory

```
*************************************************************************
```
These Options are provided for the purpose of developing a directory of resources (IHS,
state, private, tribal etc.) used for patients on a particular Register. A Resource Directory is
NOT required for a Register—
```
*************************************************************************
```

         RE   **Add or Edit a Resource Directory**
         RI   Inquire To A Specific Resource
         RL   Resource Directory (Detailed Listing)
         RS   Print Resource (By Services Available)
         SI   Inquire To A Specific Service Available

Select Resource Directory Option: **RE**   **Add or Edit a Resource Directory**

```
                        ************************************
                        **   CASE MANAGEMENT SYSTEM     **
                        ************************************
                                 VERSION 2.0
                             SELLS HOSPITAL/CLINIC

                          RESOURCE DIRECTORY LISTING
```

ENTER A RESOURCE NAME: **DR. SMITH**
 ARE YOU ADDING 'DR. SMITH' AS A NEW CMS RESOURCE (THE 5TH)? **Y** **(YES)**
  RESOURCE: DR. SMITH//
   STREET: **123 NORTH STREET**
   CITY: **BILLINGS**
   STATE: **MT**   MONTANA
   ZIP CODE: **59102**
   PHONE: **652-1295**
  CONTACT: **RECEPTIONIST**
Select SERVICES PROVIDED: **SPEECH THERAPY**
 ARE YOU ADDING 'SPEECH THERAPY' AS A NEW SERVICES PROVIDED
     (THE 1ST FOR THIS CMS RESOURCE)? **Y** **(YES)**

 Select CLINIC DATE(S): **6-1-95**   JUNE 1, 1995
 ARE YOU ADDING 'JUNE 1, 1995' AS A NEW CLINIC DATE(S)
     (THE 1ST FOR THIS SERVICES PROVIDED)? **Y** **(YES)**

Select DESCRIPTIVE DATE: **1ST TUESDAY OF EACH MONTH**
ARE YOU ADDING '1ST TUESDAY OF EACH MONTH' AS A NEW DESCRIPTIVE DATE
      (THE 1ST FOR THIS SERVICES PROVIDED)? **Y** **(YES)**

PROGRAM DESCRIPTION:
1>**THIS IS THE PROGRAM DESCRIPTION FIELD FOR DR. SMITH**
2>
EDIT Option:
OFFICE HOURS.: **9:00 AM TO 5:00 PM**
REGION SERVED: **MONTANA**
COST:
1>**ENTER COST FIGURES HERE**
2>
EDIT Option:
HOW TO APPLY:
1>**ENTER PERTINENT INFORMATION RELATED TO APPLICATION**
2>
EDIT Option:
OTHER INFORMATION:
1>**THIS IS PROVIDED FOR OTHER INFORMATION**

```
*************************************
**   CASE MANAGEMENT SYSTEM     **
*************************************
         VERSION 2.0
     SELLS HOSPITAL/CLINIC


   RESOURCE DIRECTORY LISTING
```

SUB MENU . . .
RD   Resource Directory

    RE   Add or Edit a Resource Directory
    RI   **Inquire To A Specific Resource**
    RL   Resource Directory (Detailed Listing)
    RS   Print Resource (By Services Available)
    SI   Inquire To A Specific Service Available

Select Resource Directory Option; **RI**   **Inquire To A Specific Resource**

```
*************************************
**   CASE MANAGEMENT SYSTEM     **
*************************************
         VERSION 2.0
     SELLS HOSPITAL/CLINIC


   RESOURCE DIRECTORY LISTING
```

Select CMS RESOURCE: **DR. SMITH**

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

      ////===INQUIRE TO A SPECIFIC RESOURCE REPORT DISPLAY===////

```
*************************************
**   CASE MANAGEMENT SYSTEM     **
*************************************
     LOCAL RESOURCE DIRECTORY
```

REPORT DATE: 06/08/95   PAGE: 1

     NAME: DR. SMITH
    STREET: 123 NORTH STREET
      CITY: BILLINGS   STATE: MONTANA   ZIP: 59102
    PHONE: 652-1295
CONTACT: RECEPTIONIST
    HOURS: 9:00 AM TO 5:00 PM
  REGION: MONTANA

SERVICES(S):	SERVICE	CLINIC DATES	DESCRIPTIVE DATE
	--------------	----------------------	------------------------------
	SPEECH THERAPY	JUNE 8, 1995	1ST TUESDAY OF EACH MONTH

PROGRAM DESCRIPTION

THIS IS THE PROGRAM DESCRIPTION FIELD FOR DR. SMITH

ELIGIBILITY REQUIREMENTS

COST INFORMATION

ENTER COST FIGURES HERE

HOW TO APPLY

ENTER PERTINENT INFORMATION RELATED TO APPLICATION

OTHER INFORMATION

THIS IS PROVIDED FOR OTHER INFORMATION

```
                    **************************************
                    **   CASE MANAGEMENT SYSTEM    **
                    **************************************
                              VERSION 2.0
                           SELLS HOSPITAL/CLINIC

                        RESOURCE DIRECTORY LISTING
          SUB MENU . . .
          RD      Resource Directory

                  RE      Add or Edit a Resource Directory
                  RI      Inquire To A Specific Resource
                  RL      Resource Directory (Detailed Listing)
                  RS      Print Resource (By Services Available)
                  SI      Inquire To A Specific Service Available


Select Resource Directory Option:  RL      Resource Directory (Detailed Listing)
```

```
                    **************************************
                    **   CASE MANAGEMENT SYSTEM    **
                    **************************************
                              VERSION 2.0
                           SELLS HOSPITAL/CLINIC


                        RESOURCE DIRECTORY LISTING
```

DEVICE: **Enter a Device Number or; Hit Return Key to Display to Screen**

////===RESOURCE DIRECTORY (DETAILED LISTING) REPORT DISPLAY===////

```
                    **************************************
                    **   CASE MANAGEMENT SYSTEM    **
                    **************************************
                          LOCAL RESOURCE DIRECTORY
```

REPORT DATE: 06/08/95   PAGE: 1
==
          NAME: DR. FANG
        STREET: 123 STREET
          CITY: TUCSON   STATE: ARIZONA   ZIP: 85711
         PHONE: (520) 295-2533
       CONTACT: RECEPTIONIST
         HOURS: 8-5
        REGION:

SERVICES(S):   SERVICE   CLINIC DATES   DESCRIPTIVE DATE
               ---------------   ----------------   ------------------------------
               FAMILY MEDICINE   5 DAYS/WEEK
               ------------------------------   ------------------------------
==
          NAME: DR. SMITH

```
STREET:   123 NORTH STREET
  CITY:   BILLINGS           STATE:  MONTANA          ZIP: 59102
 PHONE:   652-1295
CONTACT:  RECEPTIONIST
 HOURS:   9:00 AM TO 5:00 PM
REGION:   MONTANA
```

SERVICES(S):   SERVICE   CLINIC DATES   DESCRIPTIVE DATE
               --------------   ---------------   -----------------------------
               SPEECH THERAPY   1ST TUESDAY OF EACH MONTH
               -----------------------------   -----------------------------

PROGRAM DESCRIPTION

    THIS IS THE PROGRAM DESCRIPTION FIELD FOR DR. SMITH

ELIGIBILITY REQUIREMENTS

COST INFORMATION

    ENTER COST FIGURES HERE

HOW TO APPLY

    ENTER PERTINENT INFORMATION RELATED TO APPLICATION

OTHER INFORMATION

    THIS IS PROVIDED FOR OTHER INFORMATION

```
                        ************************************
                        **    CASE MANAGEMENT SYSTEM    **
                        ************************************
                                  VERSION 2.0
                              SELLS HOSPITAL/CLINIC


                          RESOURCE DIRECTORY LISTING
           SUB MENU . . .
           RD     Resource Directory

                   RE      Add or Edit a Resource Directory
                   RI      Inquire To A Specific Resource
                   RL      Resource Directory (Detailed Listing)
                   RS      Print Resource (By Services Available)
                   SI      Inquire To A Specific Service Available


Select Resource Directory Option:  RS      Print Resource (By Services Available)
```

```
                        ************************************
                        **    CASE MANAGEMENT SYSTEM    **
                        ************************************
                                  VERSION 2.0
                              SELLS HOSPITAL/CLINIC


                          RESOURCE DIRECTORY LISTING


DEVICE: Enter a Device Number or; Hit Return Key to Display to Screen


          ////---PRINT RESOURCE (BY SERVICES AVAILABLE)  REPORT DISPLAY---////
```

```
                        ************************************
                        **    CASE MANAGEMENT SYSTEM    **
                        ************************************
                                SERVICES PROVIDED
```

REPORT DATE: JUNE 8, 1995   PAGE: 1
RESOURCE   PHONE   CONTACT

      SERVICES PROVIDED: FAMILY MEDICINE
   DR. FANG   (520) 295-2533   RECEPTIONIST
   TUCSON MED CTR

      SERVICES PROVIDED: SPEECH THERAPY
   DR. SMITH   652-1295   RECEPTIONIST

```
**************************************
**   CASE MANAGEMENT SYSTEM   **
**************************************
              VERSION 2.0
          SELLS HOSPITAL/CLINIC

        RESOURCE DIRECTORY LISTING
```

SUB MENU . . .
RD   Resource Directory

    RE   Add or Edit a Resource Directory
    RI   Inquire To A Specific Resource
    RL   Resource Directory (Detailed Listing)
    RS   Print Resource (By Services Available)
    SI   **Inquire To A Specific Service Available**

Select Resource Directory Option: **<u>SI</u>**   **Inquire To A Specific Service Available**

```
**************************************
**   CASE MANAGEMENT SYSTEM   **
**************************************
              VERSION 2.0
          SELLS HOSPITAL/CLINIC

        RESOURCE DIRECTORY LISTING
```

Enter a Service: FAMILY MEDICINE

DEVICE: **<u>Enter a Device Number</u> or; Hit Return Key to Display to Screen**

    ////---PRINT RESOURCE (BY SERVICES AVAILABLE) REPORT DISPLAY---////

```
**************************************
**   CASE MANAGEMENT SYSTEM   **
**************************************
              SERVICES PROVIDED
```

REPORT DATE: JUNE 8, 1995   PAGE: 1

RESOURCE	PHONE	CONTACT

   SERVICES PROVIDED: FAMILY MEDICINE
DR. FANG   (520) 295-2533   RECEPTIONIST
TUCSON MED CTR

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```
                    **********************************
                    **  CASE MANAGEMENT SYSTEM  **
                      **          VERSION 2.0          **
                    **********************************

                              MAIN MENU

          CR        Create/Modify Register Structure
          AU        Add Authorized Users
          BL        Build Supporting Lists
          DL        Display Supporting Lists ...
          AD        Add/Delete Patients ...
          DE        Data Entry
          RG        Report Generation ...
          RD        Resource Directory ...
          QM        Q-Man (PCC Query Utility)
          DEL       Delete Entire Register
          LTR       Manage Recall Letters ...
                    Install IHS Diabetes Register
```

```
                        ************************************
                        **  CASE MANAGEMENT SYSTEM  **
                        **            VERSION 2.0           **
                        ************************************

                                  MAIN MENU

              CR        Create/Modify Register Structure
              AU        Add Authorized Users
              BL        Build Supporting Lists
              DL        Display Supporting Lists ...
              AD        Add/Delete Patients ...
              DE        Data Entry
              RG        Report Generation ...
              RD        Resource Directory ...
              QM        Q-Man (PCC Query Utility)
              DEL       Delete Entire Register
              LTR       Manage Recall Letters ...
                        Install IHS Diabetes Register
```

Select Main Menu Option: **QM** **Q-Man (PCC Query Utility)**

NOTE: Major additions have been incorporated into the Report Generation Menu Options. Creation of Templates, within the CMS Package, maybe utilized in linking all PCC visit related data to those patients in your Register. Utilizing any one of the CMS Report Options, you may create a Template (List of Register Patients). You may, then, use this Template within the Q-Man Query Utility and access a limitless number of demographic and/or clinical data for these patients.

The example below demonstrates how to access the last 3 PCC visits for only those patients residing in a Template which was created within the CMS Reports Options. You may want to refer to the Q-Man User Manual for quick reference in utilizing the Q-Man Software Application.

```
             *****  WELCOME TO Q-MAN: THE PCC QUERY UTILITY  *****

       **************************************************************
       **       WARNING...Q-Man produces confidential patient information.      **
       **        View only in private.  Keep all printed reports in a secure area.      **
       **          Ask your site manager for the current Q-Man Users Guide.          **
       **************************************************************
```

Query utility: IHS Q-MAN Ver. 2
Current user: TONI M JARLAND
Chart numbers will be displayed for: YOUR FACILITY   NOTE: If you do not have
Access to demographic data: PERMITTED   Access to Clinical Data,
Access to clinical data: PERMITTED   contact your Site Manager.
Programmer privileges: YES

Select one of the following:
  1   SEARCH PCC Database (dialogue interface)
  2   FAST Facts (natural language interface)
  3   RUN Search Logic
  4   VIEW/DELETE Taxonomies and Search Templates
  5   FILEMAN Print
  9   HELP
  0   EXIT

     Your choice: SEARCH// **SEARCH**   PCC Database (dialogue interface)

***** SEARCH CRITERIA *****
What is the subject of your search? LIVING PATIENTS // **LIVING PATIENTS**

Attribute of LIVING PATIENTS**: [ENTER A TEMPLATE NAME CREATED FROM A
                    CMS REPORT**
Select one of the following =>

     1) LIVING PATIENTS must be a member of the CMS TEMPLATE NAME cohort
     2) LIVING PATIENTS must NOT be a member of the CMS TEMPLATE NAME cohort
     3) Select a random sample of the CMS TEMPLATE NAME cohort
     4) Count the number of entries in the CMS TEMPLATE NAME cohort

Your choice (1-4): 1// **1**

Attribute of LIVING PATIENTS: **VISIT**

SUBQUERY: Analysis of multiple VISITS

     First condition/attribute of "VISIT": **LAST**
     Enter the value which goes with LAST; e.g., LAST 3, LAST 10, etc.
     Value: **3**

     Next condition/attribute of "VISIT":

Subject of search: PATIENTS
     ALIVE TODAY   [SER = .02]
     MEMBER OF 'TMJ AGE GR 80' COHORT   [SER = 99.00]
      Subject of subquery: VISIT
      LAST 3

Select one of the following:
1   DISPLAY results on the screen
2   PRINT results on paper   Note:
3   COUNT 'hits'   Choose the Output Option. You may
4   STORE results of a search in a FM search template   also save Q-Man runs in a Template
5   SAVE search logic for future use   (Option #4) and Transfer patients
6   R-MAN special report generator   automatically into your Register.
9   HELP   See TX Transfer Patients.
0   EXIT
Your choice: DISPLAY/ / **1**   DISPLAY results on the screen

You have 2 options for listing VISITS =>

1)   For ea. patient, list all VISITS which match your criteria
2)   List all PATIENTS with VISITS meeting your criteria, but do not list the individual values of ea. VISIT

Your choice (1 or 2): 1// **(1)**

////===Q-MAN REPORT DISPLAY OPTION===///

Please note: Patients whose names are marked with an "*" may have aliases.

PATIENTS	NUMBER	VISIT
(Alive)		
ROBERTS,DIANE*	100016	JUNE 8, 1995
ROBERTS,DIANE*	100016	JUNE 6, 1995
ROBERTS,DIANE*	100016	MAY 24, 1995
JOHNSON,MARTHA*	999995	MAR 13, 1992
JOHNSON,MARTHA*	999995	APR 17, 1991
JOHNSON,MARTHA*	999995	FEB 1, 1990
GREENJEANS,ERIC*	100127	MAY 26, 1993
GREENJEANS,ERIC*	100127	APR 23, 1992
GREENJEANS,ERIC*	100127	NOV 30, 1989
REAGAN,VALERIE*	100241	OCT 21, 1992

```
         **********************************
         ** CASE MANAGEMENT SYSTEM **
            **        VERSION 2.0        **
         **********************************

                       MAIN MENU

     CR      Create/Modify Register Structure
     AU      Add Authorized Users
     BL      Build Supporting Lists
     DL      Display Supporting Lists ...
     AD      Add/Delete Patients ...
     DE      Data Entry
     RG      Report Generation ...
     RD      Resource Directory ...
     QM      Q-Man (PCC Query Utility)
     DEL     Delete Entire Register
     LTR     Manage Recall Letters ...
             Install IHS Diabetes Register
```

```
                    **********************************
                    **  CASE MANAGEMENT SYSTEM  **
                     **            VERSION 2.0            **
                    **********************************


                              MAIN MENU

             CR      Create/Modify Register Structure
             AU      Add Authorized Users
             BL      Build Supporting Lists
             DL      Display Supporting Lists ...
             AD      Add/Delete Patients ...
             DE      Data Entry
             RG      Report Generation ...
             RD      Resource Directory ...
             QM      Q-Man (PCC Query Utility)
             DEL     Delete Entire Register
             LTR     Manage Recall Letters ...
                     Install IHS Diabetes Register
```

Select Main Menu Option: **DEL**   **Delete Entire Register**

WARNING   WARNING   WARNING   WARNING   WARNING   WARNING   WARNING

The next procedure will allow you to COMPLETELY delete an entire register from the Case Management System. The register, including all patients and all information on all patients will be deleted WITH NO POSSIBILITY of recovering any of the data. Be absolutely certain this is what you want before preceding.

```
                    *************************************
                    **   CASE MANAGEMENT SYSTEM     **
                    *************************************
                        REGISTER SELECTION UTILITY
```

      EMPLOYEE HEALTH
      IHS DIABETES

REGISTER: **EMPLOYEE HEALTH**

Are you certain you want to delete the entire EMPLOYEE HEALTH register? NO// **YES**

...DELETING ALL PATIENT RELATED DATA............................

...DELETING ALL REGISTER RELATED LIST ENTRIES............................

...DELETING ALL PATIENTS FROM THE REGISTER....................................

...DELETING THE REGISTER....

```
          **********************************
          **  CASE MANAGEMENT SYSTEM  **
            **          VERSION 2.0          **
          **********************************


                      MAIN MENU


    CR      Create/Modify Register Structure
    AU      Add Authorized Users
    BL      Build Supporting Lists
    DL      Display Supporting Lists ...
    AD      Add/Delete Patients ...
    DE      Data Entry
    RG      Report Generation ...
    RD      Resource Directory ...
    QM      Q-Man (PCC Query Utility)
    DEL     Delete Entire Register
    LTR     Manage Recall Letters ...
            Install IHS Diabetes Register
```

```
*************************************
**   CASE MANAGEMENT SYSTEM    **
*************************************
           VERSION 2.0
        SELLS HOSPITAL/CLINIC


      RECALL LETTER MANAGEMENT
```

SUB MENU . . .
LTR   Manage Recall Letters

   LTP Print Specified Recall Letter(s)
   LTS Setup/Modify Letter Format Structure

NOTE: The Setup/Modify Letter Format Structure is provided so you may 'Customize' the format structure for each individual Register. Upon completion, ALL Letters for this particular Register will be displayed in this standard format.

Address Starting Line	The Number of Lines from the Top of the Page
Address Starting Column	The Number of Lines from the left margin
Letter Signature	Name of the Person who signs the letter
Letter Head Line 1 &2	Desired Letter Head which will appear at the top of each letter.
Additional Letter Statement	If desired, an additional customized text field is provided for the purpose of adding pertinent information relative to the content and scope of a Register letter.

```
*************************************
**   CASE MANAGEMENT SYSTEM    **
*************************************
      REGISTER SELECTION UTILITY
```

  EMPLOYEE HEALTH

REGISTER: **EMPLOYEE HEALTH**

```
**************************************
EMPLOYEE HEALTH REGISTER
**************************************
```

Format Structure for RECALL LETTERS:

ADDRESS STARTING LINE.. **10**   (Top Margin Start Position Number)
ADDRESS STARTING COLUMN: **20**   (Left Margin Start Position Number)
LETTER SIGNATURE.......: **MRS. JANE SMITH** (Person Signing All Letters)
LETTER HEAD LINE 1.....: **BILLINGS AREA INDIAN HEALTH SERVICE**
                                                 (First Header line)
LETTER HEAD LINE 2.....: **BILLINGS, MONTANA**   (Second Header line)

In addition to the standard narrative content, RECALL LETTERS may also contain specified text content. If desired, you may enter this additional information in the following Word Processing Field!

ADDITIONAL LETTER STATEMENT:
1>THIS IS EMPLOYEE HEALTH ADDITIONAL STATEMENT PARAGRAPH
2>THIS IS LINE #2 OF THE STATEMENT PARAGRAPH.   YOU MAY ENTER
3>ANY ADDITIONAL INFORMATION WHICH WILL APPEAR ON THE LETTER.

```
                    ************************************
                    **   CASE MANAGEMENT SYSTEM    **
                    ************************************
                              VERSION 2.0
                          SELLS HOSPITAL/CLINIC


                        RECALL LETTER MANAGEMENT


        SUB MENU . . .
        LTR     Manage Recall Letters


                LTP     Print Specified Recall Letter(s)
                LTS     Setup/Modify Letter Format Structure
```

NOTE: Recall Letters may be sorted by:

          (1) Appointment Status, (2) Next Appointment Date, (3) Patient, or (4) Recall Date.

          The Referral, Provider, Purpose, Next Appointment Date, Contact Person, and Contact Telephone Number
          (which appear on each Patient's Recall Letter) are obtained from each Patient's Recall Date entry. This
          information is entered under the DE Data Entry Menu Option and selecting the Data Entry Choice of RECALL
          DATE.

          A sample of the Recall Letter may be displayed, prior to printing the Recall Letter. If you answer 'Yes' to
          display the Recall Letter, you will also be asked if you want to modify the letter format and/or the additional text
          field. If you answer 'Yes' to modify the letter format, you will be prompted for each field identical to Menu
          Option LTS Setup/Modify Letter Format Structure.

```
                    ************************************
                    **   CASE MANAGEMENT SYSTEM    **
                    ************************************
```

          EMPLOYEE HEALTH

REGISTER: **EMPLOYEE HEALTH**

```
                    ************************************
                         EMPLOYEE HEALTH REGISTER
                    ************************************
                         REPORT SORTING UTILITY
```

The RECALL LETTERS report can be sorted by one or more of the following attributes.
'<==' indicates a mandatory selection.

     1) APPOINTMENT STATUS   3) PATIENT
     2) NEXT APPOINTMENT DATE   4) RECALL DATES

Your choice: **4   RECALL DATES**

Start with what date: **5-15-95** (MAY 15, 1995)
End with what date: **5-15-95** (MAY 15, 1995)

Within RECALL DATES, want to sort by another attribute? NO// **(NO)**

Do you want to VIEW the Standard Letter before printing? NO// **(NO)**

DEVICE: **Enter a Device Number** **or; Hit Return Key to Display to Screen**

Recall Letter Display Example:

MAY 26, 1995

BILLINGS AREA INDIAN HEALTH SERVICE
BILLINGS, MONTANA

Dear Client:

Review of our records indicate ABE GRANT (Chart #: 101770)

is scheduled for the following appointment with:

      REFERRAL: IHS
      PROVIDER: DR. DONALD JONES
      PURPOSE: ANNUAL PHYSICAL
      APPT DATE: 06/25/95

To arrange an appointment date/time, please contact:

      MRS. JOHNSON
      295-2570

THIS IS EMPLOYEE HEALTH ADDITIONAL STATEMENT PARAGRAPH.
THIS IS LINE #2 OF THE STATEMENT PARAGRAPH. YOU MAY ENTER
ANY ADDITIONAL INFORMATION WHICH WILL APPEAR ON THE LETTER.

                                    MRS. JANE SMITH

GRANDMOTHER
PO BOX 3355
BILLINGS, MT 59103

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```
          **********************************
          **  CASE MANAGEMENT SYSTEM  **
            **          VERSION 2.0            **
          **********************************


                        MAIN MENU


        CR      Create/Modify Register Structure
        AU      Add Authorized Users
        BL      Build Supporting Lists
        DL      Display Supporting Lists ...
        AD      Add/Delete Patients ...
        DE      Data Entry
        RG      Report Generation ...
        RD      Resource Directory ...
        QM      Q-Man (PCC Query Utility)
        DEL     Delete Entire Register
        LTR     Manage Recall Letters ...

                Install IHS Diabetes Register
```

```
         ************************************
         **  CASE MANAGEMENT SYSTEM  **

          **          VERSION 2.0          **

         ************************************

                      MAIN MENU

         CR       Create/Modify Register Structure
         AU       Add Authorized Users
         BL       Build Supporting Lists
         DL       Display Supporting Lists ...
         AD       Add/Delete Patients ...
         DE       Data Entry
         RG       Report Generation ...
         RD       Resource Directory ...
         QM       Q-Man (PCC Query Utility)
         DEL      Delete Entire Register
         LTR      Manage Recall Letters ...
                  Install IHS Diabetes Register
```

Select Main Menu Option: **Install** **IHS Diabetes Register**

Note: IHS NATIONAL DIABETES REGISTER

If you have already installed the IHS DIABETES REGISTER at your Site, DO NOT proceed with this Menu Option.-

The new IHS Diabetes Management System is a Standardized Case Management Register and group of computer programs designed to facilitate individual diabetes patient care and diabetes program management. Features of the Diabetes Management System include:

- A Diabetes Register, using the PCC CASE MANAGEMENT SYSTEM.
- A Diabetes Flow Sheet included on the PCC Health Summary
- A monitoring/prompting of important care items on the Health Summary
- Standard nomenclature for recording diabetes exams and education on PCC Forms
- An automated Diabetes Program Audit Report - PCC Management Reports Application
- Access to all PCC Clinical Data

If you have any questions regarding the Diabetes Register, consult your local Site Manager and/or refer to the PCC Diabetes Management System Resource Manual (dated January 1994) for further detailed information on this Register.

SPECIAL NOTE:

Most Sites do not have a locally developed Diabetes Register within the CMS Package. Those sites would install the IHS DIABETES REGISTER and would not have to worry about converting data. A few Sites may already have their own locally developed register and will want to convert it to the IHS Standard elements, diagnoses, and complications. Some sites may have a FileMan file containing patient names and data. After installing the IHS DIABETES REGISTER, the User can utilize Q-Man to retrieve the patient names from their FileMan file and move (only) those names into the new IHS DIABETES REGISTER.